3in1 Tool

Release Notes

Versions 1.0 - 3.5

December 2012

Joint Contingency Contracting System

Defense Logistics Agency

Contents

Note to 3in1 Users: The 3in1 training video was created for version 1.0. These Release Notes provide instructions for new capabilities released in subsequent versions of the 3n1 device and Workstation software applications, which were developed after the training video was produced.

1   What's New in Version 3.5

1.1   3in1 Workstation Enhancements

1.1.1   Registering New Users – New Fields

New fields that record a user's service branch and rank have been added to the Register New User, Personal Information screen. (If the user is not a member of the military, select Civilian or Contractor in the Service field.)

New User Registration – Personal Information Tab

1.1.2   Financial Administration Enhancements

1.1.2.1 Refresh Purchase Requests Button

After updating purchase requests or cash advances, click the new **Refresh Purchase Requests** button to update the data displayed on the *Financial Administration* window.

Financial Administration Window

1.1.2.2 Exporting Financial Data to Excel

The new **Export** button exports all data on the *Financial Administration* window to an Excel file, including rows that are not visible due to screen display limitations.

1.1.3   Selecting FOOs without Selecting a Unit

Another new feature available in multiple areas of the Workstation enables users to select an AOR, an office, and a FOO without having to select a unit. This allows selecting any FOO in an office; specify the unit to restrict the search to only the FOOs assigned to a specific unit.

The example below shows selecting a FOO using only the AOR and Contract Office, from the *Select Financial User* window.
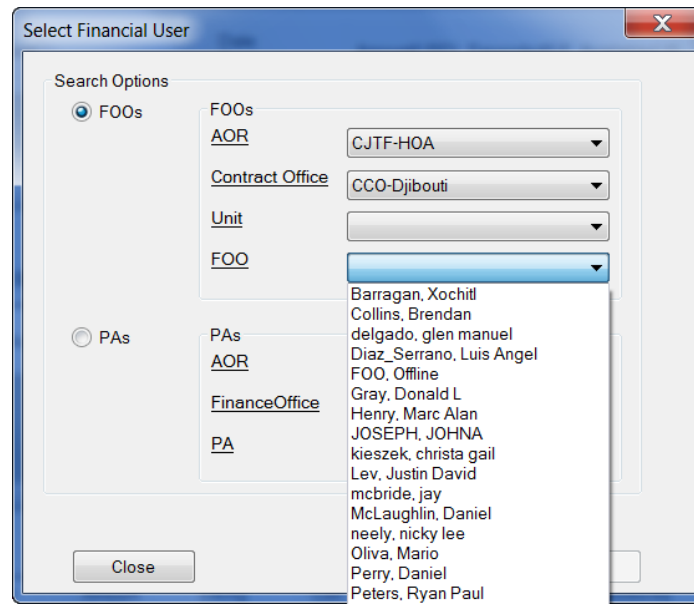
Select Financial User Dialog Box

1.1.4 New Search Feature for Purchase Orders and Cash Advances

Previously, users could search for a purchase order using the PIIN number. In this version, use the **File**, **Documents**, **Document Handling** feature to search for purchase orders and cash advances by user (and also date range for cash advances). View the results, as well as any documents attached to the PO or cash advance. You can also attach documents or delete attachments.

To search for purchase orders, specify the AOR, Office, Unit (optional) and user name. The date range is also optional. Click the **Load User's Purchase Orders** button to retrieve a summary of all purchase orders that meet the criteria.

Select a purchase order in the table to see if any attachments exist. Click the **View** button to view the attachment; click the **Delete** button to remove the attachment; or click the **Upload** button to upload a file attachment to the PO.

Document Handling Form, Purchase Order Tab

To search for cash advances, specify the AOR, Office, Unit (optional) and user name. The date range is also optional. Click the **Load User's Cash Advances** button to retrieve a summary of all purchase orders that meet the criteria.

Select a purchase order in the table to see if any attachments exist. Click the **View** button to view the attachment; click the **Delete** button to remove the attachment; or click the Upload button to upload a file attachment to the PO.

Document Handling Form, Cash Advance Tab

1.1.5 Managing Paying Agents

After provisioning a device to a FOO/PA team, a fast way to add or remove authorized paying agents is to use the **Device Management**, **Post Provision PA Update** command. Select the AOR, Office, and FOO. Currently assigned PAs are displayed in the *Post Provision PA Update* window. The associated device ID is also displayed.

Post Provision PA Update Dialog Box

To remove the PA, click the **Remove PA** button. Click Yes on the confirmation screen. To add a PA, click the **Add New PA** button. Select a PA name on the *Select User* window.

Optionally modify a PA's privileges on this screen. Select the **Approved** checkbox to approve the PA role; unmark the check box to deny the PA role assignment to the user. Select the **Allow Device Originated CA** (cash advances) checkbox to enable Paying Agents to initiate cash advances from the handheld device.

1.1.6   User and Office Subscriptions

1.1.6.1 Subscriptions

On the **File**, **Profile Management, User Profile** window, use the **Subscriptions** button if you need to download data belonging to other offices or users before going offline to work. Select the users and/or offices using the Subscriptions feature. Then when you choose to work offline, all subscription data is included in your offline database.

To add user and/or office subscriptions:

1.   On the *User Profile* window, click the **Subscriptions** button. The *Offline Data Subscriptions* window is displayed.
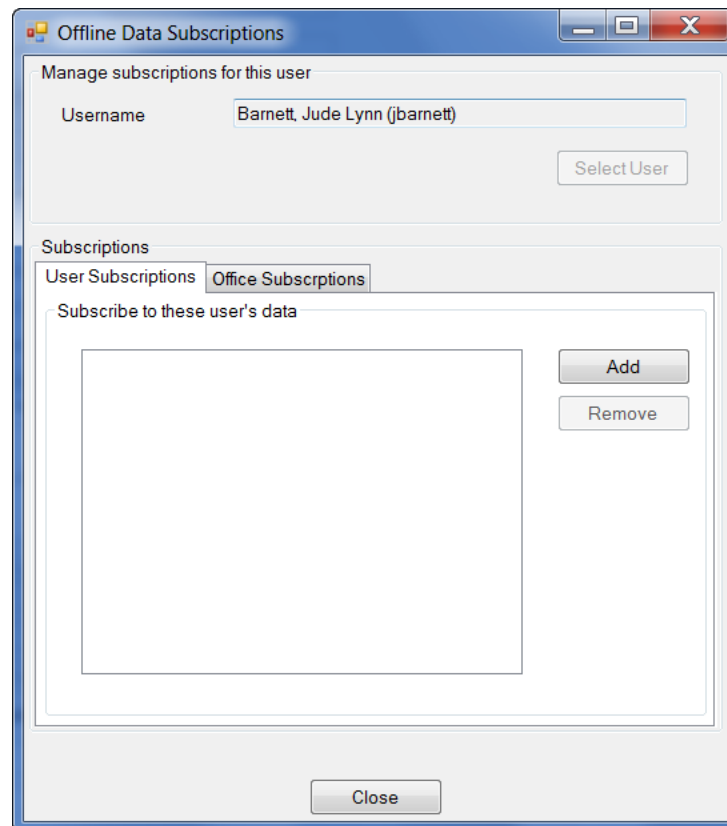
User Subscriptions Tab

2. On the **User Subscriptions** tab, click the **Add** button.
3. On the *Select User* window, select a user.

   The selected user is added to the **User Subscriptions** tab.
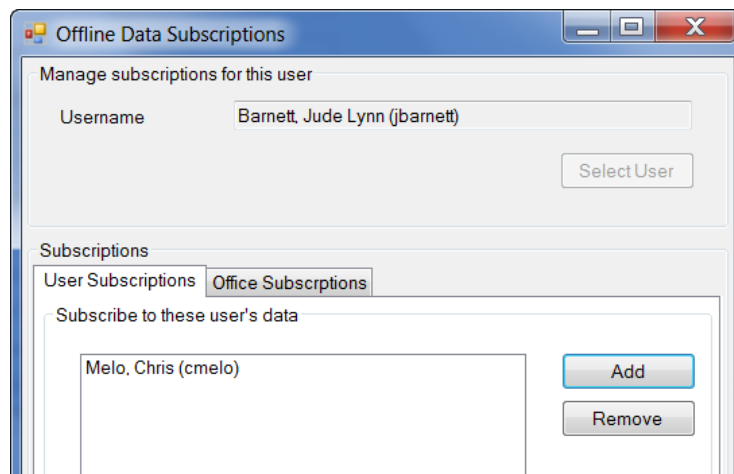
Selected users' data will be downloaded when you go offline to work

4. On the **Office Subscriptions** tab, click the **Add** button to select an office.
5. On the *Select Office* window, select an office from the drop-down list and then click the **Select** button.
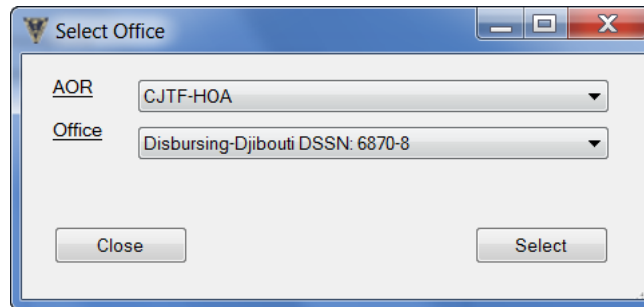
Select Office Window

The selected office is added to the **Office Subscriptions** tab.
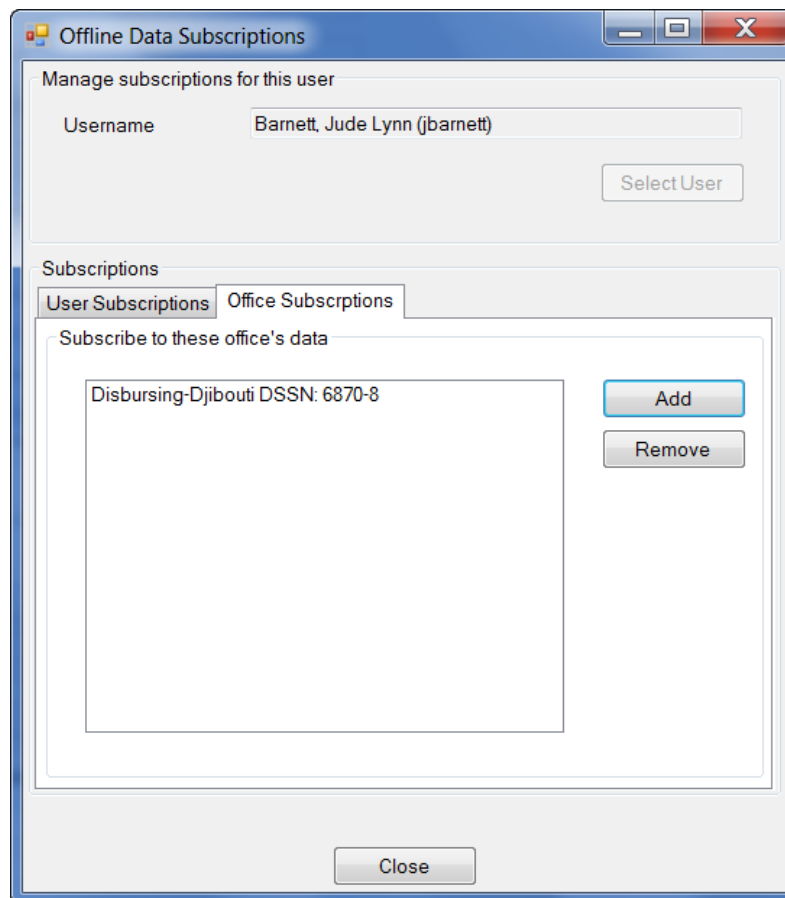
Office Subscriptions Tab

If you later need to delete a subscription, highlight the user or office name in the table and then click the **Remove** button.

1.1.7   Reports and Extracts

1.1.7.1 New Purchase Request and Purchase Order Search Report

The new **Purchase Request and Purchase Order Search** report enables searching for PRs by user or PR number. Select **Reports/Extracts**, **Purchase Request and Purchase Order Search**. The *Purchase Request and Purchase Order Search* window is displayed.

To search by PR number:

1. Select the **Search by Purchase Request** radio button and enter the PR number.
2. Click the **Load Purchase Requests** button to view the PR.

Purchase Request and Order Search Window - PR located by PR number

3. Click the **Load Purchase Orders** button to view the POs associated with the PR.
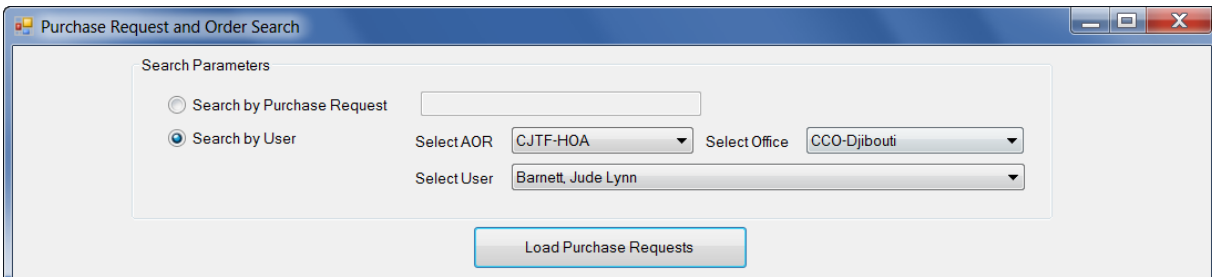
Purchase Request and Order Search Window – Loaded Purchase Orders

To search by user, select the **Search by User** radio button and then specify the AOR, Office and User, using the drop-down lists. Click the **Load Purchase Requests** button to view the POs associated with the user.

Purchase Request and Order Search Window – Search by User

Click the **Export** button to export the report to Excel.

1.1.7.2 Clearance Information Report Enhancement

The **Clearance Information** report has a new option, the "Include Cleared Orders" checkbox. Select the checkbox to include all cleared orders within the specified date range.

Clearance Information Report Parameters Dialog Box

1.1.7.3 FOO Provisioning Report Enhancements

The FOO Provisioning report now displays information about the device provisioned to a FOO, clearance order and procurement policies in effect, and authorized Paying Agent information.

FOO Provisioning Report

1.1.7.4 Procurement Controls Report Enhancements

The Procurement Controls report now displays details about item and limit policies: the policy title, message, item name or limit amount, limit type, and item or limit message.

Procurement Controls Report

1.1.8   Reserving FOO Identifiers

The **Set Up**, **Reserve FOO Identifiers** feature enables a KO to reserve a set of FOO IDs. FOO IDs are assigned when each provision is created; FOO IDs are also part of the PIIN. KOs use the Reserve FOO Identifiers feature to avoid duplication of PIINs among multiple contracting offices that share the same DODAAC. The other purpose of this feature is to avoid creating duplicate FOO IDs when KOs work offline.

When a KO reserves a set of FOO IDs, no other KO from the same contracting office can use these IDs. For example, assume KO1 at Contracting Office A reserves FOO IDs from AA to BA. KO2 at Contracting Office A cannot use the FOO IDs that were reserved by KO1; the system will allow KO2 to use the next available sequential FOO ID, which in this case, would be BB.

This feature is also useful when working offline. Without reserving FOO IDs, two KOs at the same contracting office who both create provisions while working offline, will create duplicate FOO IDs. This means the PIINs also will be duplicated and there will be an unresolvable conflict when the replicas are synchronized. For example, assume KO1 and KO2 at Contracting Office A each create an offline replica. Then they each create a provision; the system will automatically assign the FOO ID "AA" to both KOs, which will lead to duplicate PIINs (the FOO ID is part of the PIIN). To avoid this conflict, the KOs should each reserve a set of different FOO IDs before going offline. When the KOs create offline replicas and create provisions in offline mode, the system assigns two different sets of FOO IDs, using the reservation list saved by each KO.

To reserve FOO IDs:

1. Select **Set Up**, **Reserve FOO Identifiers** from the main menu.
2. On the *FOO Identifier Reservations* window, use the drop-down lists to select the correct AOR, Contracting Office and Contract Officer.
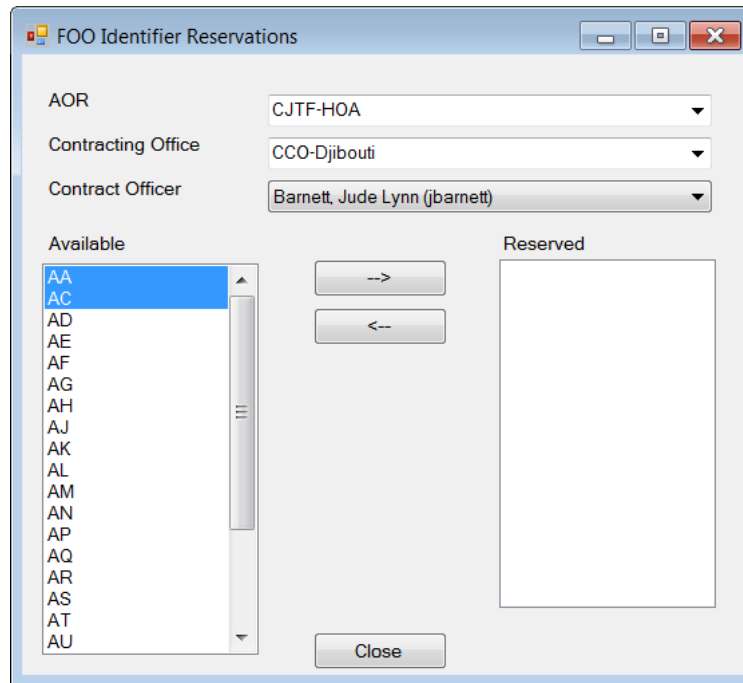
FOO Identifier Reservations Window

3. Select one or more FOO IDs in the left column. (To select multiple IDs, press Shift or Ctrl and then click the IDs).

4. Click the right arrow [-->] to reserve the selected IDs. The reserved IDs move to the right column.
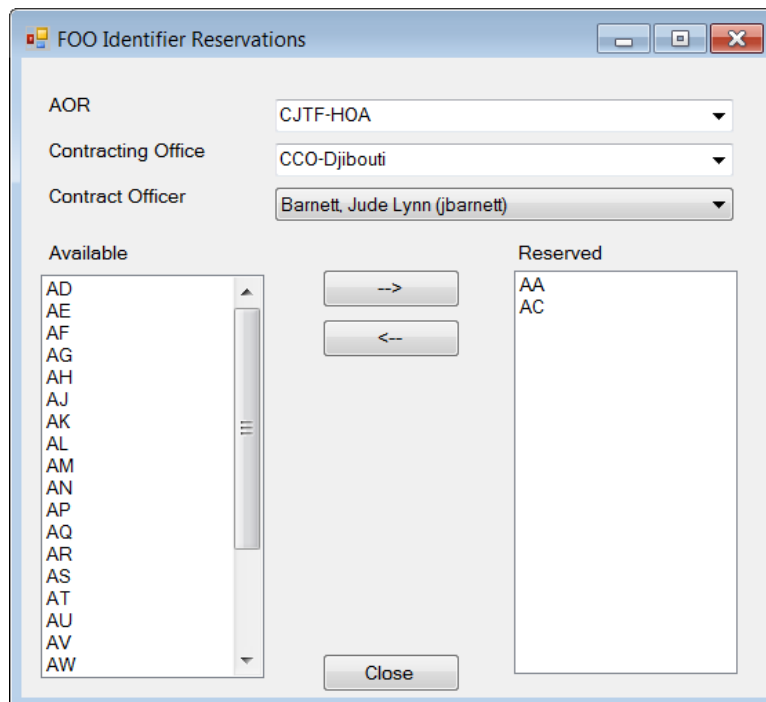
Two FOO IDs have been selected and placed in the right column

If for some reason you need to unreserved the IDs, select them in the right column, then click the left

arrow [<--] button. The IDs return to the unreserved list in the left column.

1.1.9   Document Administration

System administrators can easily locate and replace document attachments using the **File**, **Documents**, **Document Administration** feature. For example, replace a large PDF file with a smaller version in JPEG format. It is also possible to delete a document without replacing it.

To access the Document Administration feature:

1. Select **File**, **Documents**, **Document Administration.** Note that only System Administrators may access this feature.
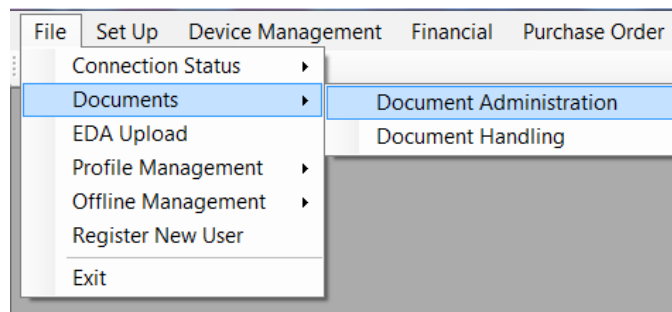
File, Documents menu

2. On the *Document Management* window, use a combination of search fields to locate documents.
    - For example, to search for all documents that exceed a certain size, fill in only the **Minimum Size** field and then click the **Search** button.
    - Search results are displayed in the Results table.
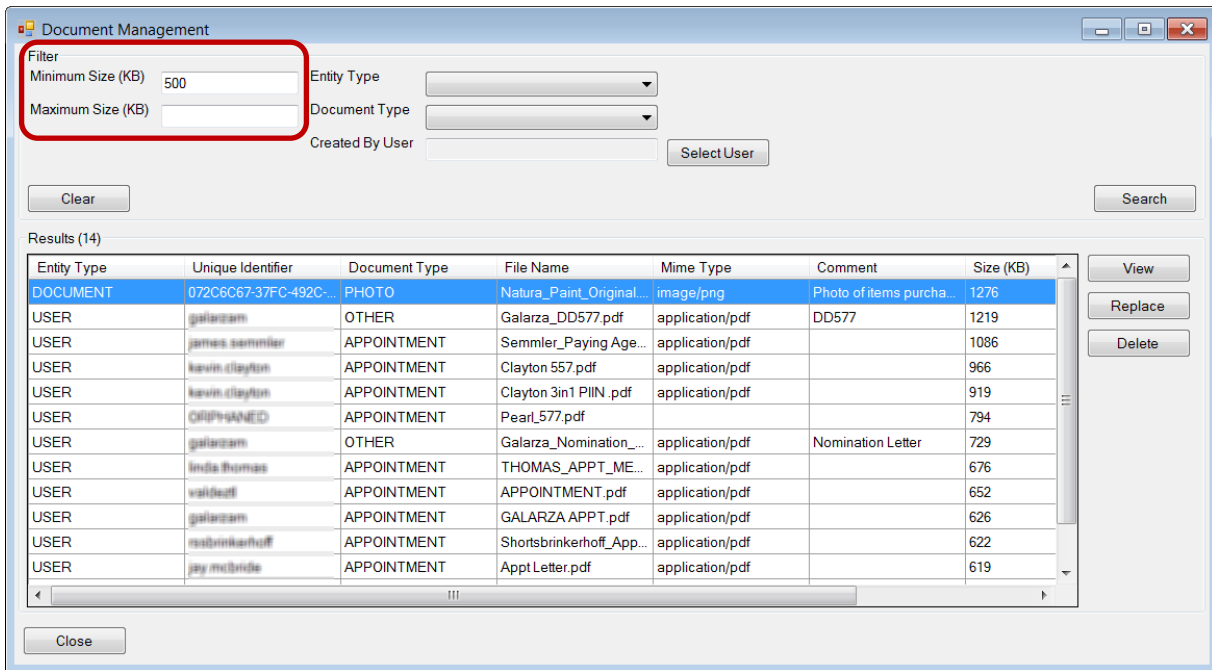
Document Management Window

All documents that exceed 500KB are displayed in the Results table. Click the *Size (KB)* column heading to sort the results by file size.

3. Optionally use the **Entity Type** and **Document Type** search fields by selecting from the drop-down list in each field.
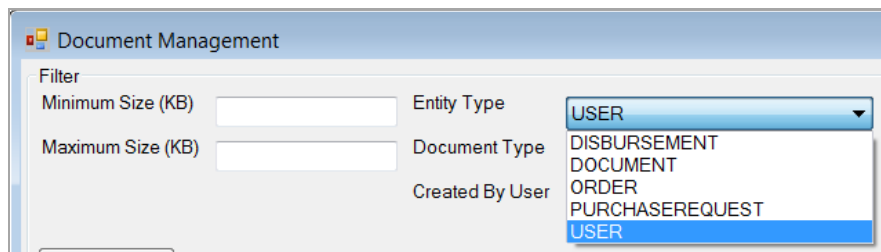
Document Management Window - Entity Type Drop-Down List
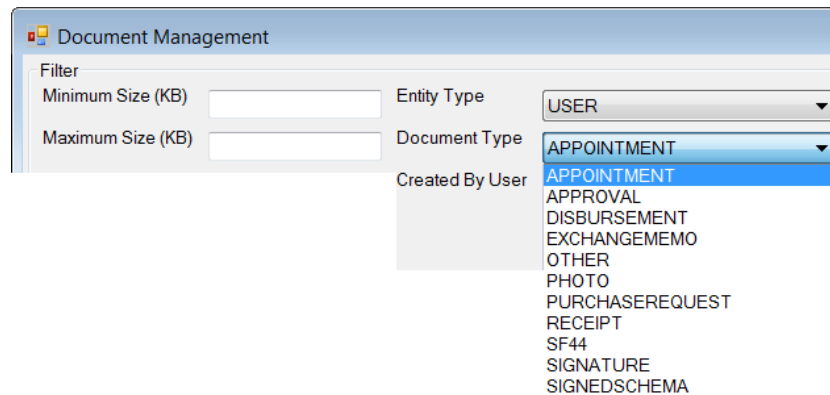
Document Type Drop-Down List

Keep in mind the results must meet all specified criteria. For example, a restrictive search looks for a specific type of document (APPOINTMENT) created by a specific user.

The Results table will display only Appointment documents created by Gina Thomas

To clear all search criteria fields and start over, click the **Clear** button.

1.1.9.1 Deleting Documents

Once the search results are displayed, you may delete documents by selecting them and clicking the **Delete** button. Consider sorting the documents first, to group similar ones before deleting. Click a column heading to sort in ascending order; click again to sort in descending order.

To select multiple documents, press the Shift key and click multiple documents

To view the content of a document in a separate window, select the document in the table and then click the **View** button.

1.1.9.2 Replacing Documents

To replace a document:

1. In the **Results** table, select the document to be replaced.
2. Click the **Replace** button.
3. In the *Attach Document* dialog box, click the **Browse** button to locate and select the replacement file.
4. Optionally enter text in the **Comment** field.
5. Click the **Upload File** button to perform the replacement.
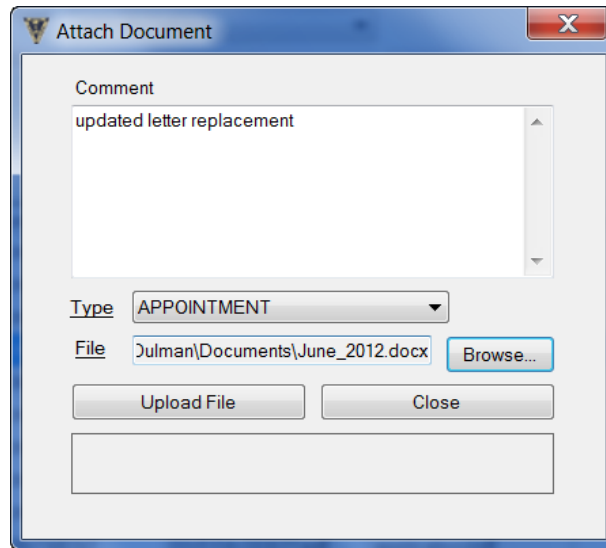
Attach Document Dialog Box

A confirmation message is displayed after a successful upload.
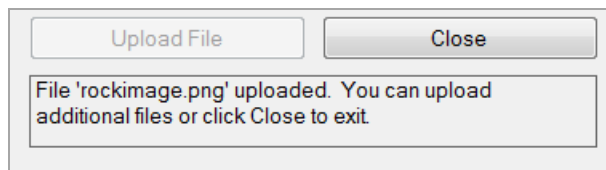
Confirmation Message

1.1.10 AOR Administration

In previous releases, the only way to add a new unit was to select **File**, **Profile**, **Unit Profile**. Now you create a unit from the AOR Administration module. Select **Set Up**, **AOR Administration**.

After selecting an office on the Offices tab, the **Add Unit** button is enabled.

AOR Administration Window

When you click the **Add Unit** button the *Select Unit* window is displayed.

Select Unit Window

Click the **Add** button to create a unit. Complete the details for the new unit, then click the **Save** button.

Unit Window

Units can be created on the *Edit Office* window also. First, click the **Edit Office** button on the **Offices** tab. Then, on the *Offices* window, click the **Add** button in the **Units Serviced** area.

Offices Window

The *Select Unit* window is displayed, as shown above. Click the **Add** button to open the *Unit* window. Complete the fields to define the new unit, then click the **Save** button.

1.1.11 Virtual Device Provisioning

Enhancements to the 3in1 Tool enable all teams in an AOR to use the 3in1 prime database to track funding. Previously, only those personnel who were assigned a handheld device could access the 3in1 prime database. But the new virtual device feature can be used by teams that draw emergency funds, but do not spend anything, and by team members who do not make enough purchases to justify assignment of a handheld device.

1.1.11.1 Step 1: Provisioning a Virtual Device

Using the existing "Provision Device" feature in the 3in1 Workstation, Contracting Officers (KOs) select a clearly identified virtual device ID, as shown in the following figure.
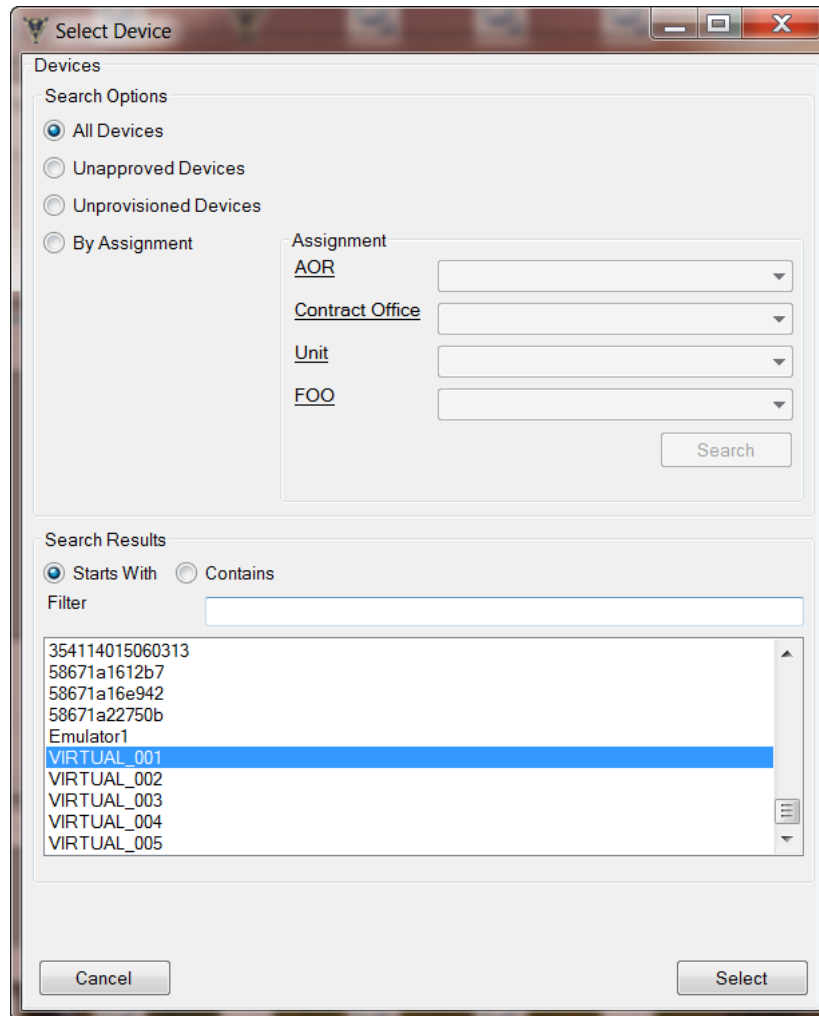
Virtual Devices are clearly identified on the Select Device window

KOs then provision the virtual device as they do actual handheld devices – selecting a FOO/PA team, assigning purchase orders, procurement controls, etc. When assigning PIINs, it is necessary to select the "Assign Manual PIIN" checkbox. The remaining provisioning steps are the same as for provisioning to an actual handheld device. If purchases increase later, the data on the virtual device can be transferred to an actual handheld device.

Note: It is highly recommended that each virtual device be assigned to only one FOO/PA team, unless a PA supports multiple teams.

PIINs are assigned to virtual devices; be sure to select the "For Non-Device (Manual) Order Entry" check box

1.1.11.2 Step 2: Creating and Clearing Purchase Orders

After purchase requests have been assigned to the FOO/PA team's virtual device, purchase orders can be added manually, using the "Purchase Order," "Add Purchase Order" command. Users then follow the normal clearance process. Order data from virtual devices can be exported to DDS; DDS import is also functional.

Add Purchase Order Window

1.1.11.3 Important Differences between Virtual and Actual Devices

Users involved in the ordering and clearance processes need to be aware of significant differences between virtual and actual devices:

- The Shopping List feature is not available to FOOs using virtual devices.
- The PA cannot conduct exchanges using virtual devices. The DA will need to return a cash advance in one currency, and then issue a cash advance in a different currency.
- The PA cannot create a cash advance or return cash on a virtual device. The DA can perform these actions on the Workstation.
- The Workstation allows you to flag orders and submit comments to a FOO who is assigned a virtual device, but the FOO will not receive those comments since the physical device doesn't exist. Instead, there must be some type of dialogue between the clearing entity and the FOO to clear the flag and get the orders approved.
- Purchase requests associated with a virtual device cannot be closed by users. They must contact the 3in1 Help Desk to request closing the purchase request.

Workstation Feature	Documented in Role-Based 3in1 Training Manual			
	FOO/PA	**Contracting Officer**	**RM/DA**	**Reviewer**
Registering New Users – New Fields	*Module 2: Hardware /Application Setup, Lesson 1: Registering New Users*	*Module 5: Managing 3in1 Workstation Users, Lesson 1: Registering New Users*	*Module 2: Application Setup, Lesson 1: Registering New Users*	*Module 2: Application Setup, Lesson 1: Registering New Users*
Refresh Purchase Requests Button	N/A	*Module 13: Updating Financial and Procurement Information, Lesson 1: Updating Purchase Requests and Cash Advances*	*Module 9: Updating Financial Information, Lesson 1: Updating Purchase Requests*	N/A
Exporting Financial Data to Excel	N/A	*Module 13: Updating Financial and Procurement Information, Lesson 1: Updating Purchase Requests and Cash Advances*	*Module 4: Issuing Purchase Requests & Cash Advances, Lesson 1: Financial Process*	N/A
Selecting AOR and Office without selecting a Unit to view all FOOs	N/A	*Module 10: Managing Purchase Orders on the Workstation, Lesson 1: Looking Up and Completing Purchase Orders on the Workstation*	*Module 6: Managing Purchase Orders on the Workstation, Lesson 1: Looking Up and Completing Purchase Orders*	N/A
Search for Purchase Orders and Cash Advances through Document Handling	*Module 8: Viewing PRs, Cash Advances, & Purchases on the Workstation, Lesson 1: Viewing Financial Information*	*Module 10: Managing Purchase Orders on the Workstation, Lesson 1: Looking Up and Completing Purchase Orders on the Workstation*	*Module 6: Managing Purchase Orders on the Workstation, Lesson 1: Looking Up and Completing Purchase Orders* *Module 9: Updating Financial Information, Lesson 1: Updating Purchase Requests*	*Module 3: Application Familiarization, Lesson 5: Viewing Attached Documents*
Post Provision PA Update	N/A	*Module 13: Updating Financial and Procurement Information, Lesson 2: Updating Procurement Information*	N/A	N/A

Workstation Feature	Documented in Role-Based 3in1 Training Manual			
	FOO/PA	**Contracting Officer**	**RM/DA**	**Reviewer**
User and Office Subscriptions	*Module 3: Application Familiarization, Lesson 2: Managing User Account Information*	*Module 5: Managing 3in1 Workstation Users, Lesson 2: Managing User Roles & Accounts*	*Module 3: Application Familiarization, Lesson 3: Managing User Information*	*Module 3: Application Familiarization, Lesson 3: Managing User Account Information*
Purchase Request and Purchase Order Search Reports	*Module 12: Reporting from the Workstation, Lesson 1: Generating Reports*	*Module 14: Reporting from the Workstation, Lesson 1: Generating Reports*	*Module 10: Reporting from the Workstation, Lesson 1: Generating Reports*	*Module 6: Reporting from the Workstation, Lesson 1: Generating Reports*
Other Report Enhancements	*Module 12: Reporting from the Workstation, Lesson 1: Generating Reports*	*Module 14: Reporting from the Workstation, Lesson 1: Generating Reports*	*Module 10: Reporting from the Workstation, Lesson 1: Generating Reports*	*Module 6: Reporting from the Workstation, Lesson 1: Generating Reports*
Reserve FOO Identifiers	N/A	*Module 7: Activating Devices for FOO/PA Teams, Lesson 1: Provisioning Devices from the Workstation*	N/A	N/A
Sys Admin Document Administration	N/A	*Module 17: Document Administration, Lesson 1: Replacing and Deleting Document Attachments*	N/A	N/A
AOR Administration Enhancements	N/A	*Module 6: Configuring the 3in1 Workstation, Lesson 1: AOR Setup*	N/A	N/A
Virtual Device Provisioning	N/A	*Module 7: Activating Devices for the FOO/PA Team, Lesson 1: Provisioning Devices from the Workstation*	N/A	N/A

1.2   3in1 Handheld Device Enhancements

1.2.1   Security Checks

Important security checks added to the device must be performed by the user when using the device for the first time. Users should check the following settings on the *Device and Database Status* screen**.**

1. Verify the **ADB** (Android Debug Bridge) **Enabled** setting is OFF. This prevents the installation of unauthorized apps on the device.

Device and Database Status Screen

2. Scroll down the screen and verify that the Non-market Apps Enabled setting is ON.
    – The 3in1 program is not available in the Android Marketplace, so the On setting enables 3in1 to run on the device.

3. Also verify that the **Stay Awake Enabled** setting is OFF. If the setting is set to ON, return the device or contact the help desk. Do not use the device.
    – Setting **Stay Awake Enabled** to **Off** also conserves the device battery life.
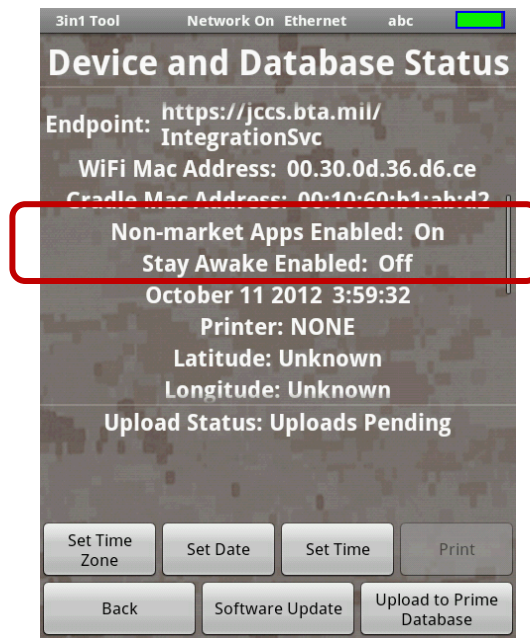
Device and Database Status Screen – Scroll down to view additional fields

1.2.2   Enhanced Market Research Tool

The Market Research tool, which is used for price comparisons among vendors, can now perform three types of searches.

1. **Device only**. Compare items purchased from multiple vendors that were recorded on the local device only.
2. **Prime database only**. Search for purchase information within an entire contracting office. The advantage of this search is access to purchases made by other FOOs on other devices or on the Workstation. Save selected merchant information on your local device.
3. **Device and prime database**. A combination of search types 1 and 2.

Performing prime database searches (2 and 3 above) requires network connectivity. Performing market research on the device also requires users to log in to the device. **Market Research** can be selected from the device **Tools** tab.

On the *Search Items* screen, users enter the name of the Search Item and select the database to search, then tap the **Search** button.

Market Research Search Features

The search results can be viewed in detail on the device, printed, or saved to the device for later use. See the 3in1 training manual for details.

Market Research Screen Displays Search Results

The buttons on the *Market Research* screen provide the following functions:

View Item Details – Tap a merchant to view the complete merchant address and phone number, and most recent transaction information on the *Market Research Item Details* screen.

Market Research Item Details Screen – Displays the details about one vendor

Save Merchant (use after searching only the prime database) - Saves the merchant information to the merchant list on the device.

Save List - Save the results from a prime database search to the local device. Specify a name for the list. Lists are saved for 90 days.

Market Research Save Results as a List

Load Saved Lists - Retrieves a saved market research list

1.2.3   Storing "Furnish To" Addresses When Placing an Order

Each time a new address is entered on the *Furnish To Address* screen, it is saved by the device. This feature saves time by enabling users to select from a list of saved addresses.

1.   On the *Furnish To Address* screen, tap the **Select Furnish To Address From List** button.

Furnish To Address Screen

2.   A list of previously entered addresses is displayed. Tap one of the addresses.
3.   The selected address is highlighted and the **Select** and **Remove** buttons are enabled. Tap the **Select** button to select the address.
     − To remove an address that is no longer needed, tap the **Remove** button.

Furnish To Address List

1.2.4   Capturing Merchant Location

The merchant location, as specified by latitude and longitude, can be captured using the device GPS feature. (Note that the device setting **GPS Enabled** must be selected in order to use this feature. Refer to the *Device Tools and Settings* module in the training manual for details.)

1. On the *Edit Merchant* screen, tap inside the **Location** field to open the *Merchant Location* popup.

Edit Merchant Screen   Merchant Location Popup

2. Verify the **Current Location** displays actual coordinates. If you are indoors, the Current and Order location will display as "Unknown" for both latitude and longitude. GPS generally does not work indoors.
3. Tap the **Capture Location** button. The coordinates display in the **Location** field on the *Edit Merchant* screen.
4. Tap the **Save** button on the *Edit Merchant* screen.

Edit Merchant Screen with Captured Location Coordinates

1.2.5   Enhanced Receiver Screen

The receiver acknowledges receipt of goods by signing the *Receiver* screen. In some cases, the receiver may be the FOO. The name of the receiver must be entered before entering a signature. Enhancements to the Receiver screen make it easier to enter a name.

On the *Select Receiver* popup screen, the drop-down lists the FOO and PA names. Select one of these as the Receiver, or select **Other** if someone other than the FOO or PA is receiving the supplies or services on behalf of the government. If you select **Other**, enter the person's name in the **Name** field.

Select Receiver Screen

1.2.6   Taking Pictures from the Cash Advance Details and Paying Agent Screens

Using the device's built-in camera, users can now take pictures of documents from the Cash Advance Details and Paying Agent signature screens.

1.2.6.1 Cash Advance Details Screen

Use the new **Documents** button on the *Cash Advance Details* screen to photograph documents associated with the cash advances.

1. On the *Cash Advance Details* screen, tap the **Documents** button.
2. On the *Cash Advance Images* screen, tap the **Take Picture** button.
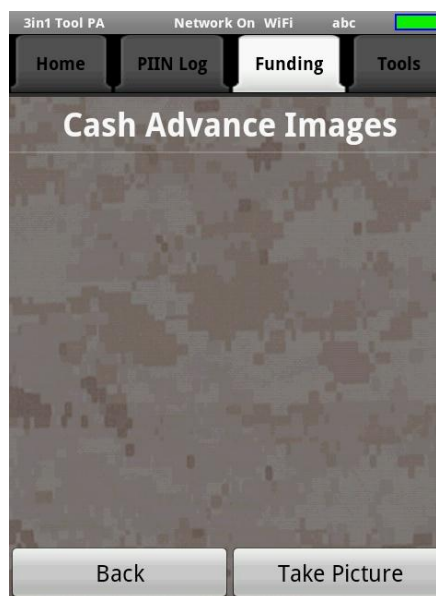
Cash Advance Details Screen	Cash Advance Images Screen

3. Use the device camera to capture an image of the document. (Steps to use the camera were previously documented in the training manual for photographing purchase items/receipts).
4. When you tap the **Take Picture** button, the captured image is displayed on the *View Document Image* screen.
5. Select a radio button to identify the image as a **Disbursement Image** or as an **Exchange Memo**.
6. If you are satisfied with the captured image, tap the **Accept** button.
   – When you tap the **Accept** button, the camera takes the picture and the image will be attached to the cash advance.
   – If you are not satisfied with the captured image, tap the **Retake** button. Use the **Zoom In** button to capture a closer view of the document.

View Document Image Screen

Once images are taken, they are listed on the *Cash Advance Images* screen. To view an image, tap one. The *View Document Image* screen then displays options to delete, print (if a printer is connected), or view the image in detail.

If the device is not connect to a network while capturing images of cash advance documents, all the images are stored on the device. Once an image is uploaded to the prime database, it will be removed from the device. After that, the only way to delete the image is from the Workstation.

1.2.6.2 Paying Agent Screen

The new **Capture Receipt Image** button on the Paying Agent signature screen enables PAs to capture photos of merchant receipts. After tapping the **Capture Receipt Image** button to activate the camera, focus and take the picture. See the training guide for instructions on using the camera; these were previously documented for photographing purchase items/receipts.

Paying Agent Signature Screen – New Capture Receipt Button

1.2.7   Entering Flag Comments on Clearance Screen

Entering comments/responses to flagged orders has been integrated with the *Clearance* screen on the device. Now device users can respond to a flag comment simply by entering a response in the **Comment** field on the *Clearance* screen, and clicking the **Save Comment** button.

The comments will be uploaded to the 3in1 Workstation, where they can be viewed on the purchase order **FOO Responses and Clearance Status** tab.

1.2.8   Adding General Clearance Comments

The ability the add clearance comments is not restricted to responding to Flags and Approvals. The FOO can add clearance comments as desired. The device first lists all the comments entered on the Workstation by clearance reviewers, and then the FOO responses.

Comments entered by clearance reviewers overwrite their previous comment. For example a comment entered by the Finance Officer, Crystal Fisher, when she flagged an order, was overwritten by the comment she entered when she approved the order. However, FOO comments cannot be overwritten or edited; once entered, they become part of the permanently record.

1. **Note the initial Flag Comment by Finance Officer Crystal Fisher. The FOO, Maria Lopez, responded with two comments.**

2. **When Crystal Fisher enters a second comment, it replaces her first comment. However, all of FOO Maria Lopez's comments are retained.**

1.2.9   New Status Message when Setting APNs

If you are using GSM and need to configure the device, it is necessary to select or set up the Access Point Name (APN) using technical information from the GSM provider. On the device *General Settings* screen, select **APN Settings**.

If the device does not have a SIM card installed, new APN settings cannot be set. Selecting **New APN**, on the *APNs* screen on a device that does not have a SIM, results in a warning message that notifies the user to install a SIM card.
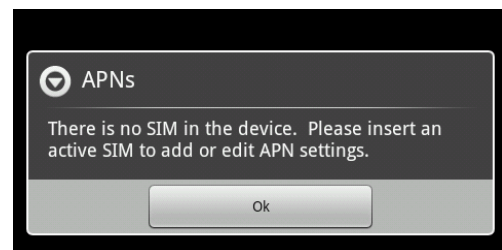
1.2.10 Other Enhancements

1.2.10.1 DSSN Displayed on Printed SF44

SF44 forms printed from the 3in1 device and Workstation now display the DSSN in brackets beside the Finance Office unit name line.

1.2.10.2 Recognizing a "Bricked" Device

If a device must be disabled and sent to the 3in1 Program Management Office, use the Workstation Disable Device feature. This is sometimes referred to as "bricking" the device. Once a device has been bricked, the Contracting Office must follow the 3in1 Support Help Desk instructions for sending back the device.

New functionality helps users recognize a bricked device. A device is bricked if the 3in1 logo is displayed on the screen at start up, but the device remains locked. The device has lost all functionally; even pressing the Power button to turn off the device will not work. It is necessary to remove the battery in order to power down the device.

Device Feature	Documented in Role-Based 3in1 Training Manual			
	FOO/PA	Contracting Officer	RM/DA	Reviewer
First Time Use Security Checks	*Module 2: Hardware/ Application Setup, Lesson 2: Getting Started with the Device and Printer*	*Module 4: Registering New Devices, Lesson 1: Registering & Approving New Devices*	N/A	N/A
Enhanced Market Research Tool	*Module 5: The Ordering Process, Lesson 2: Making a Purchase*	*Module 8: The Ordering Process, Lesson 1: Making a Purchase*	N/A	N/A
Storing "Furnish To" Addresses	*Module 5: The Ordering Process, Lesson 2: Making a Purchase*	*Module 8: The Ordering Process, Lesson 1: Making a Purchase*	N/A	N/A
Capturing Merchant Location	*Module 5: The Ordering Process, Lesson 1: Creating Vendors on the 3in1 Device*	N/A	N/A	N/A
Enhanced Receiver Screen	*Module 5: The Ordering Process, Lesson 2: Making a Purchase*	*Module 8: The Ordering Process, Lesson 1: Making a Purchase*	N/A	N/A
Taking Pictures from the Cash Advance Details and Paying Agent Screens	*Module 10: Managing Cash Advances on the Device, Lesson 1: Working with Cash Advances* *Module 5: The Ordering Process, Lesson 2: Making a Purchase*	*Module 9: Ordering Features on the Device, Lesson 2: Managing Cash Advances on the Device*	N/A	N/A
Entering Flag Comments on Clearance Screen	*Module 5: The Ordering Process, Lesson 4: Post-Order Actions*	N/A	N/A	N/A
Adding General Clearance Comments on the Device	*Module 5: The Ordering Process, Lesson 4: Post-Order Actions*	N/A	N/A	N/A
New Status Message when Setting APNs	*Module 14: 3in1 Device Tools & Settings, Lesson 2: Device Settings*	*Module 16: 3in1 Device Tools & Settings, Lesson 2: Device Settings*	N/A	N/A

2   What's New in Version 3.0

2.1   3in1 Workstation Enhancements

2.1.1   Enhanced Offline Capabilities

To facilitate a user's ability to work offline and synchronize their data with the 3in1 prime database when they return to working online, Release 3.0 contains the following enhancements:

- Users can connect their handheld device directly to the Workstation for uploading SF44 data, exchanging clearance information and other data. A DHCP server services the device and supports device-workstation TCP/IP connectivity via an Ethernet or USB network connection.

- New data synchronization settings on the User Profile window can be customized for each user. Users can choose to automatically synchronize data upon logging into or exiting the Workstation and also define the maximum size of document files attached to purchase orders.

- A KO can now authorize a PA's role. (In previous releases, only the RM/DA could provide this authorization.)

2.1.1.1 Offline Replica Creation/Synchronization & Device to Workstation Data Exchange

The 3in1 Tool Workstation application can now run either standalone (Offline) or connected to the 3in1 prime database (Online). An Internet connection is required to work in online mode. However, you can work offline and then upload your work to the 3in1 prime database when a connection can be established. In situations when your connection is unreliable, you may want to purposely work offline and control when you go online to update your information.

Note: A pre-requisite for working offline is to initialize the local 3in1 Workstation database on your computer by creating/synchronizing your local replica.

To create a local replica for the first time, select **File, Offline Management, Generate New Local Replica.**
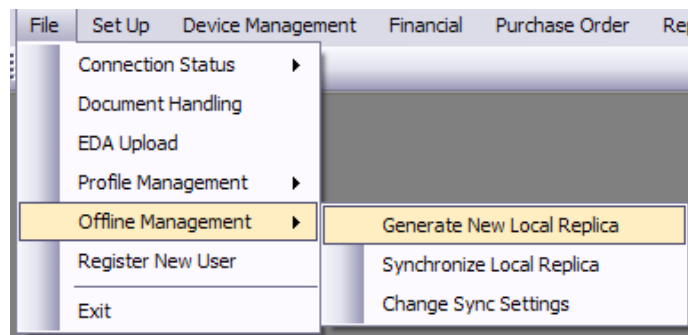
Generate New Local Replica

Once a local replica is created, it needs to be periodically updated to include the most current data from the 3in1 prime database, so that you may work offline with correct data. Also, if you are working offline, you eventually need to reconcile your 3in1 system changes to the 3in1 prime database. This back and forth reconciliation process between your local replica and the 3in1 prime database is known as synchronization in the 3in1 system.

To work offline if you are currently online (and you have previously created an offline replica):

1. From the Workstation main menu, select **File**, **Connection Status**, **Offline**.
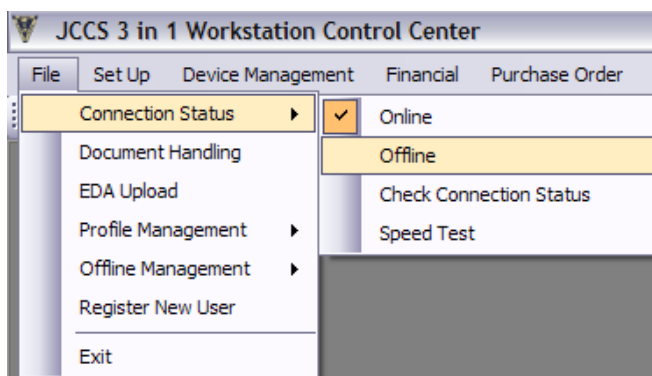
Switch from Online to Offline Mode

2. Select **Yes** on the *Synchronize?* dialog box.
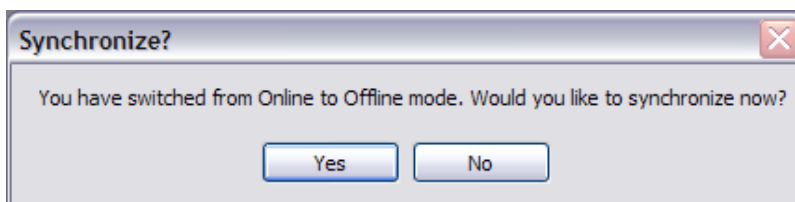
Synchronize? Dialog box

3. Click OK on the *Synchronization* dialog box.
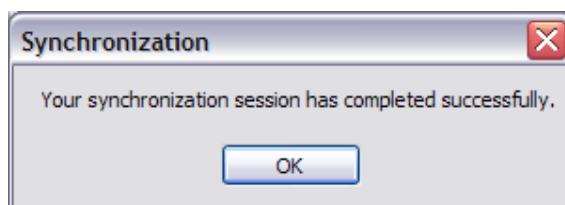
Synchronization Acknowledgement

Once you are finished working in offline mode and are ready to synchronize your system changes, select **File, Offline Management, Synchronize Local Replica.**

Select **File**, **Connection Status**, **Change Sync Settings** to return working online.

In situations where users must decide to work offline for periods of time, it is possible for FOOs to connect the 3in1 handheld device directly to the Workstation and transfer order and clearance information.

2.1.1.2 Data Synchronization Settings

To access the new data synchronization settings, select **File**, **Profile Management**, **User Profile** from the 3in1 main menu. The new settings are circled in the following figure.
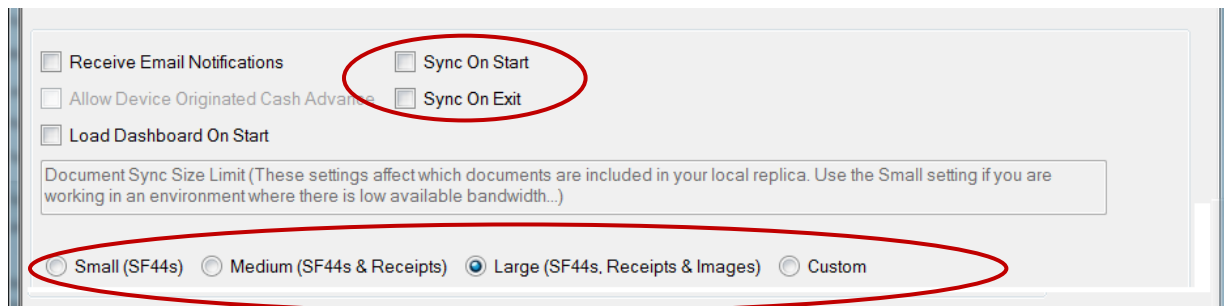
User Profile Window

The Sync on Start/Exit checkboxes will synchronize your local replica with the 3in1 database upon login/logout, if checked.

The Document Sync Size Limit options allow users in low bandwidth areas to decrease the time it takes for their local replicas to synchronize by including only certain items in their local replicas. It is recommended that users with low bandwidth choose Small, or select Custom (default is 200 kilobytes). Users in areas without major bandwidth constraints should choose Large.

- **Small:** includes only SF44s in local replica

- **Medium:** includes SF44s and Receipts in local replica

- **Large:** includes SF44s, Receipts, and Images in local replica

- **Custom:** includes documents equal to or smaller than the entered document size limit, (in kilobytes) in local replica

2.1.2   CAC (Common Access Card) Workstation Login/Registration

2.1.2.1 CAC Workstation Login

Users now have the option of logging into the 3in1 Workstation with their previously 3in1-registered CAC. After the 3in1 Workstation application is opened, and the initial warning screen is accepted, users will see the *Select Client Certificate* screen.

To login to the 3in1 Workstation using a CAC:

1. Ensure that the CAC is properly inserted into the card reader.

2. Choose a certificate from the *Select Client Certificate* screen. Click **Select**.
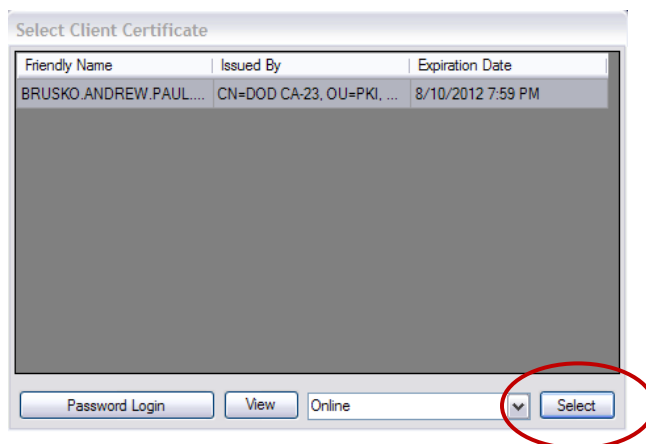
Select Client Certificate screen

3. Enter the PIN for the CAC. Click **Ok**.
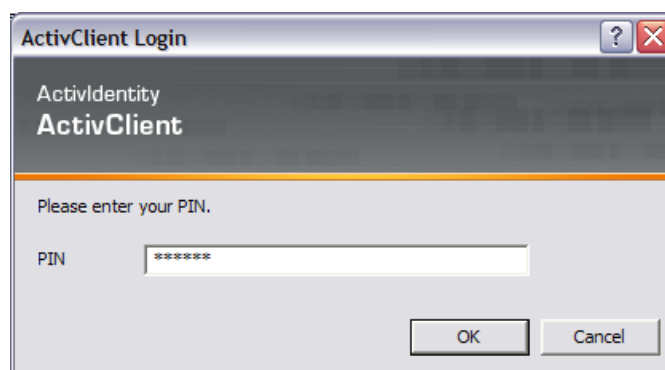
Enter PIN for CAC

4. In general, a CAC will only be associated with a single 3in1 user. Highlight the user to login to 3in1 with, then click **Select**.
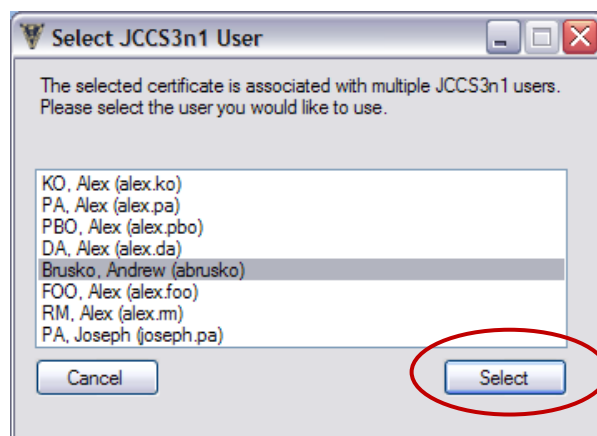
Select 3in1 User screen

5. You will now be logged into the 3in1 Workstation under the selected user.

If you do not wish to login to 3in1 with a CAC, simply click the **Password Login** button at the *Select Client Certificate* screen. You can also view certificate details of the selected CAC certificate by clicking the **View** button.

By default, the 3in1 system defaults the login to "Online" at the *Select Client Certificate* screen. If you wish to login to an offline replica with your CAC instead, choose one from the dropdown menu.
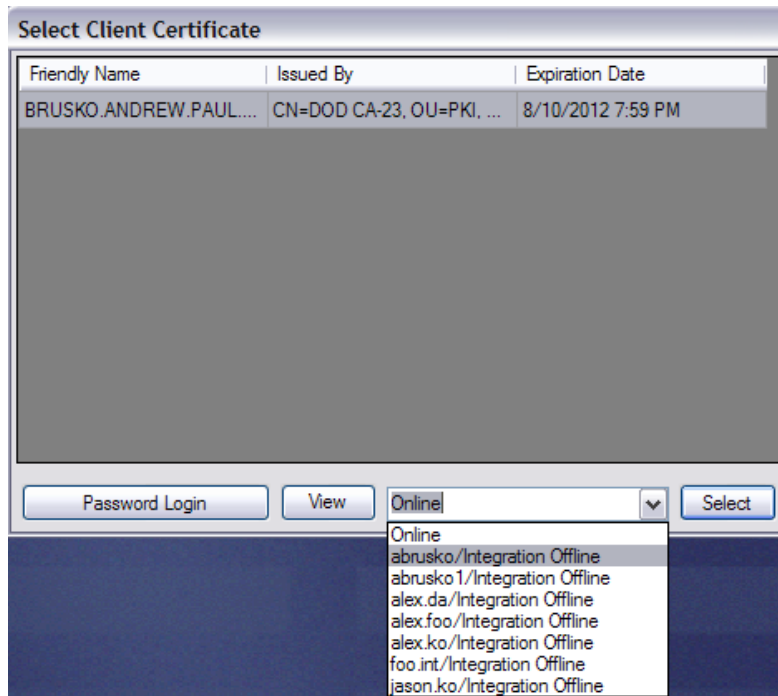
Login to Offline using CAC

2.1.2.2 CAC Workstation Registration

If your CAC is not yet registered with the 3in1 system (or you need to change your CAC information in 3in1), and you are already registered with the 3in1 system (you have a username/password):

1. Login using your username/password.

2. Upon login, select **File, Profile Management, User Profile** from the taskbar.
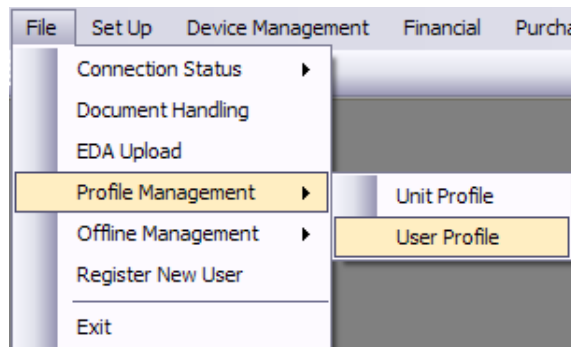
User Profile selection

3. Ensure your CAC is inserted into the card reader and click **Change Certificate** at the *User Profile* screen.
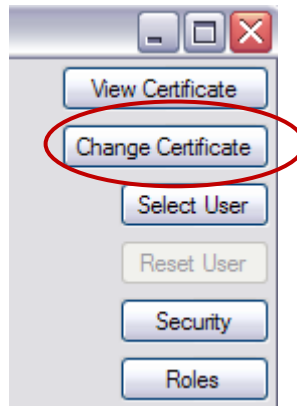
Change Certificate option in User Profile

4. Highlight the necessary certificate, then click **Select**. Enter your CAC PIN if prompted.
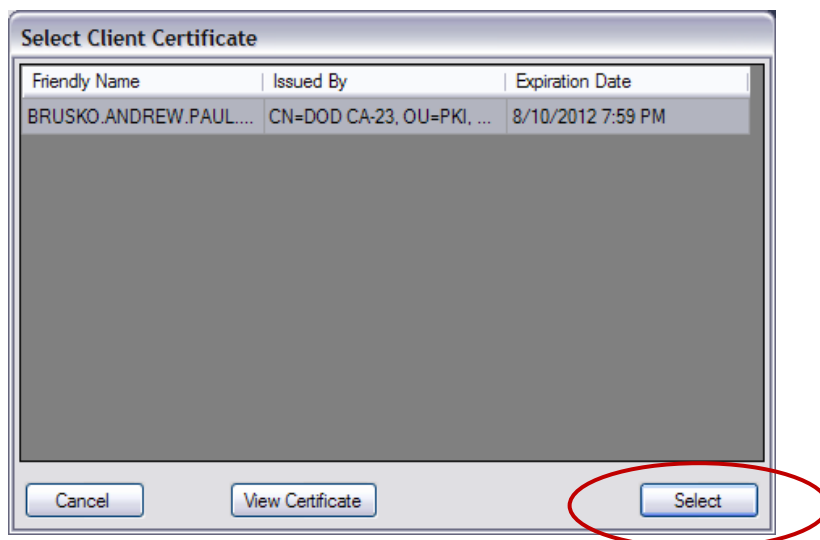
Change Certificate selection screen

5. Your current CAC information will now be registered with the 3in1 system, allowing you to login with your CAC in the future.

2.1.3 Financial Administration Enhancements

2.1.3.1 Clearing Cash Advances

Sometimes, it is necessary to make a minor adjustment in order to close out a purchase request. This can occur when there is a small difference in the cash balance due to currency exchange rates. In order to alleviate this issue, Release 3.0 brings about the necessity to "clear" a cash advance. If there is a difference between the actual amount of cash returned, and the amount that the 3in1 system expected

to be returned, this difference will be automatically reconciled and accounted for in the 3in1 system when clearing a cash advance.

Let's go through an example to demonstrate this capability.

Below, PR 0004 was issued for 1,000.00 USD. An accompanying Cash Advance for 1,000.00 USD was also issued, which is shown in the first entry in the Cash Advances table. Entries two and three show that the 1,000 USD Cash Advance was exchanged by the PA for 50,000 Afghani (entry two shows the removal of the 1,000 USD, entry three shows the issuance of 50,000 Afghani). Notice the exchange rate of 50, meaning 1 USD = 50 Afghani.

Next, in the Purchases table, notice that an order for 2,500 Afghani (equivalent to 50 USD at the current exchange rate) was placed by the FOO/PA team. This leaves 47,500 Afghani remaining on the Cash Advance.

Later, the PA exchanges the 47,500 Afghani for U.S. dollars (shown in entries four and five in the Cash Advances table). However, the exchange rate has changed since the first exchange. The exchange rate is now 45, meaning 1 USD = 45 Afghani. When the PA exchanged their 47,500 remaining Afghani, he/she received 1,055.56 in USD. The system will be expecting a return of 950 USD, but will actually receive a return of 1,055.56 (shown in entry six in the CAs table), leading to a gain of $105.56 that the 3in1 system needs to take into consideration.

Purchase Requests
Click to see cash advances. Double-Click to select a purchase request.

Status	Purchase Request	Description	Date Created	Amount(USD)	Expended(L	Available(US	Total Disbursement Adjustments (USD)	Adjusted Available(USD)	Line of Accounting
Closed Out	PR 0002	Build Supp	3/30/2012 6:44 PM	0.00	0.00	0.00	0.00000	0.00000	12345 2 2222 .8272 22 33333 33333...
Open	PR 0003	Med Supplies	4/4/2012 1:21 PM	10,000.00	0.00	10,000.00	0.00000	10,000.00000	87 2 6252 .0065 87 82827 27282927...
Open	PR 0004	Gain PR	4/4/2012 3:11 PM	1,000.00	50.00	950.00	0.00000	950.00000	22222 2 2222 .0000 22 82728 82728...

Cash Advances
Click to see purchases on a cash advance. Double-Click to select a cash advance.

Financial Officer	Date Created	ID	Activity	Linked To	Advanced Amount (Local Currency)	Curr Code	Exchg Rate	Expended Amount (Local Currency)	Expended Amount (USD)	Available Amount (Local Currency)	Advanced Amount (USD)	DDS Curr	Adj Amt (USD)	Cleared
Brusko, Andrew	4/4/2012 3:14 PM	4BB2F	Disbursement		1,000.00	USD	1	0.00	0.00	0.00	1,000.00	82	0.00000	☐
(Device Originated)...	4/4/2012 3:23 PM	4BB2F	Exchange	4BB2F	-1,000.00	USD	1	0.00	0.00	0.00	-1,000.00	82	0.00000	☐
(Device Originated)...	4/4/2012 3:23 PM	98A25	Exchange	4BB2F	50,000.00	AFN	50	2,500.00	50.00	0.00	1,000.00	TT36	0.00000	☐
(Device Originated)...	4/4/2012 3:29 PM	98A25	Exchange	98A25	-47,500.00	AFN	45	0.00	0.00	0.00	-1,055.56	TT36	0.00000	☐
(Device Originated)...	4/4/2012 3:29 PM	20789	Exchange	98A25	1,055.56	USD	1	0.00	0.00	0.00	1,055.56	TTG6	0.00000	☐
Brusko, Andrew	4/4/2012 4:06 PM	20789	Return	20789	-1,055.56	USD	1	0.00	0.00	0.00	-1,055.56	TTG6	0.00000	☐

Purchases

Order Date	Order Status	PIIN Number	Total Cost	Amount Paid	Exchg Rate	Curr Code	Ordered By Person	Received By Person	Paying Agent	Seller	Comments
4/4/2012	Cleared	67DF3212MAA10	2,500.00	50.00	50.00	AFN	Alex FOO	Alex FOO	Alex PA	Abu Wazar Supplies	

As a general rule, before clearing a cash advance, return all leftover funds from that cash advance. Once all leftover funds from the cash advance are returned, proceed to clearing the cash advance.

Also, it is advisable that the DA clear all cash advances before the RM attempts to close out a purchase request. The DA can manually clear the variance in a cash advance using the new **Clear Cash Advance** button on the *Cash Advance* window.

The Clear Cash Advance feature will be available only for "Top Level" disbursement activities. The best way to spot "Top Level" disbursement activity inside the application is to look "Disbursements" in the Activity column in the Cash Advances table on the Financial Administration screen. All of the associated transactions such as Exchanges or Return will be automatically cleared when Disbursements are cleared by the DA.

1. On the *Cash Advance* window, click the **Clear Cash Advance** button.

Cash Advance window

2. The Workstation calculates the amount of the adjustment that is required, then displays the following message.
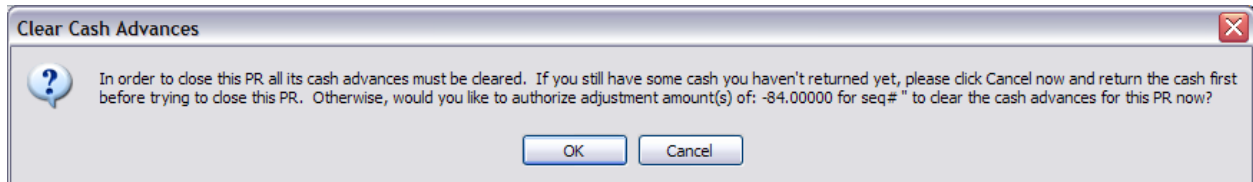

Clear Cash Advance with adjustment

− At this point, if you determine that you need to return some cash before clearing this cash advance, click the **Cancel** button and use the **Return Cash** feature, then go back to step 1 and try to clear the cash advance again.

- The other option is to click **OK**, which means that you authorize the Workstation to enter the value shown in the message in the Adjustment Amount field for the cash advance, and then clear the cash advance.

If the RM attempts to close a PR using the **Close PR** button on the *Purchase Request Administration* window, and some of the associated cash advances have not yet been cleared, the 3in1 system will request to "force" clear them.

Click **OK** to authorize an adjustment in the amount shown in the message below and clear the cash advance.

Clear Cash Advances Dialog Box – Adjustment Required

If the RM attempts to close a PR without first decommitting the remaining funds, the 3in1 system will request to "force" the closeout through PO and CA adjustments. Clicking **Yes** will force the closeout of the PR.
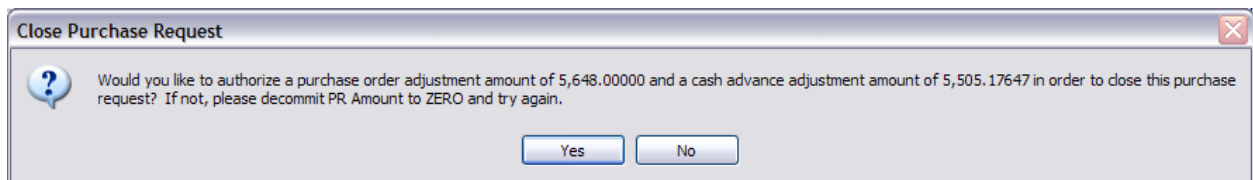
Close PR Dialog Box

The other option is to click **No** and then use the **Decommit Funds** button to decommit the remaining funds from the PR and select **Close PR** again. It is recommended that the remaining PR funds be decommitted before closing out a PR.

To decommit a PR and then close it, select **Decommit PR** from the *Purchase Request Admin* window. Enter the remaining amount to decommit, check the Closeout PR checkbox, then click **Decommit Funds**.

Decommit PR w/Closeout PR selected window

To recap, the recommended sequence of events regarding the reconciliation of funds for a PR in the 3in1 system is as follows:

1. Return all available cash for all cash advances associated to the PR

2. Clear all cash advances associated to the PR

3. Decommit remaining PR funds

4. Closeout PR

Related to this, the cash advance adjustments are displayed only on the Workstation screens. They do not affect the original purchase request nor are they displayed on the printed SF44.

In the *Purchase Request Administration* window, the new Cash Advance Adjustment and PO Adjustment fields display any adjustments made to the purchase request.

Purchase Request Administration Window – New PO and Cash Advance Adjustment Amounts

2.1.3.2 New Data Columns on the Financial Administration Window

Additional data columns have been added to the Purchase Requests and Cash Advances sections of the Financial Administration window. The Purchase Requests section now displays available funds by purchase request, as well as disbursement adjustments and adjusted available amounts in USD.

Financial Administration Window – Purchase Requests Section

New data columns in Cash Advances section show available cash by disbursement so user knows how much to return; action dates; and authorized adjustment amounts.

Financial Officer	Date Created	ID	Activity	Linked To	Advanced Amount (Local Currency)	Curr Code	Exchg Rate	Expended Amount (Local Currency)	Expended Amount (USD)	Available Amount (Local Currency)	Advanced Amount (USD)	DDS Curr	Adj Amt (USD)	Cleared
DA, Alex	3/28/2012 4:13 PM	3C1CD	Disbursement		2,500.00	USD	1	2,316.00	2,316.00	84.00	2,500.00	57	0.00000	☐
DA, Alex	3/30/2012 7:22 PM	3C1CD	Return	3C1CD	-100.00	USD	1	0.00	0.00	0.00	-100.00	57	0.00000	☐
(Device Originated) ...	4/3/2012 9:30 PM	53DC2	Exchange	B8C42	150,000.00	AFN	50	0.00	0.00	150,000.00	3,000.00	333	0.00000	☐
Brusko, Andrew	3/30/2012 6:49 PM	7EFE6	Disbursement		100,000.00	AFN	50	100,000.00	2,000.00	0.00	2,000.00	24	0.00000	☐
Brusko, Andrew	4/3/2012 9:21 PM	B8C42	Disbursement		3,000.00	USD	1	0.00	0.00	0.00	3,000.00	72	0.00000	☐
(Device Originated) ...	4/3/2012 9:30 PM	B8C42	Exchange	B8C42	-3,000.00	USD	1	0.00	0.00	0.00	-3,000.00	72	0.00000	☐
Brusko, Andrew	3/27/2012 2:31 PM	ED15C	Disbursement		5,000.00	USD	1	36.00	36.00	0.00	5,000.00	22	0.00000	☑
DA, Alex	3/30/2012 7:17 PM	ED15C	Return	ED15C	-4,964.00	USD	1	0.00	0.00	0.00	-4,964.00	22	0.00000	☑

Financial Administration Window – Cash Advances Section

The **Linked To** column in the Cash Advances section is used to identify the cash advance associated with subsequent exchanges/returns that are made. A cash advance exchange is equivalent to returning a cash advance in one currency, and adding a cash advance for the same amount in a different currency; also, one of the currencies involved is USD. Each cash advance is assigned an ID. The Linked To column identifies the ID of the cash advance associated with subsequent returns/exchanges.

2.1.4   Enhanced DDS Interface Support

2.1.4.1 Editing a Cash Advance

If a mistake was made entering the DDS Agent ID or Site ID for a cash advance, it is possible to edit these fields by using the **Edit** button on the *Cash Advance* window.

Editing a Cash Advance

2.1.4.2 Support for Marine Corps

Support has been added for Marine Corps orders. On the Purchase Request window, it is possible to select a Service Organization (Army, Navy or Marine) and the appropriate Line of Accounting fields display for the selected Service Organization (once the Add button is clicked).

New Service Organization Field on Purchase Request Window

Line of Accounting Form for Marine Corps

Definition of each Marine LoA field:

- **ACRN:** Two-digit Accounting Classification Reference Number

- **Department:** two-digit numeric code that identifies the military department or government entity receiving the appropriation

- **Fiscal year:** One-digit numeric code that designates the year funds are available for obligation

- **Basic Appropriation Symbol:** Four-digit number that identifies the type of funds used

- **Subhead:** Four-digit number that identifies a subdivision of funds used that restricts the amount, or use of funds for a certain purpose, or identifies sub-elements within the account for management purposes

- **Object Class:** Three-digit number that classifies transactions according to the nature of goods procured or services performed rather than their purpose

- **Bureau Control Number/Operating Budget:** Five-digit number that identifies operating budget holder, allotment, or organization having responsibility for managing a program

- **Sub Allotment:** One-digit number that denotes a further breakdown of the Bureau Control Number/Operating Budget at the Funds Administering Activity

- **Authorization Accounting Activity:** Six-digit alphanumeric code that identifies the activity which is responsible for performing the official accounting and reporting for the funds

- **Transaction Type:** Two-digit number that classifies transactions by type (i.e. travel advances, progress payments)

- **Property Account Activity:** Six-digit number that identifies the budget program activity (N for Navy) and the Customer Indicator (Activity UIC)

- **Cost Code:** Up to twelve digits, represents the cost code

- **Standard Document number:** Standard document number

When the Disbursing Agent uses the DDS Extract feature, purchase orders created in 3in1 are uploaded to DDS for payment processing and assigning voucher numbers, for either the Army or Marine Corps system. The system uses the DSSN of the associated Finance Office to determine whether the extract is for the Army or Marine Corps.

2.1.5   Dashboard for RMs, FOOs and PAs; Revised Dashboard for KOs and DAs

In the previous release, the Dashboard feature was available for Contracting Officers and Disbursing Agents only. Their dashboards have been updated, and now Resource Managers, Field Ordering Officers, and Paying Agents also view a Dashboard when they log into the Workstation. All Dashboards are customized for each role and user.

To update the *Dashboard* at any time, click the **Refresh** button in the bottom left corner. You may leave the *Dashboard* open while accessing other areas of the program using the menu bar. To close the *Dashboard*, click the **Close** button in the bottom right corner. To re-open the *Dashboard*, select **File**, **Dashboard**.

Displaying the *Dashboard* is a configurable option. To change this setting, go to **File**, **Profile Management**, **User Profile**.

Dashboard for Contracting Officers

Dashboard for Resource Managers

Dashboard for Disbursing Agents

Dashboard for Field Ordering Officers
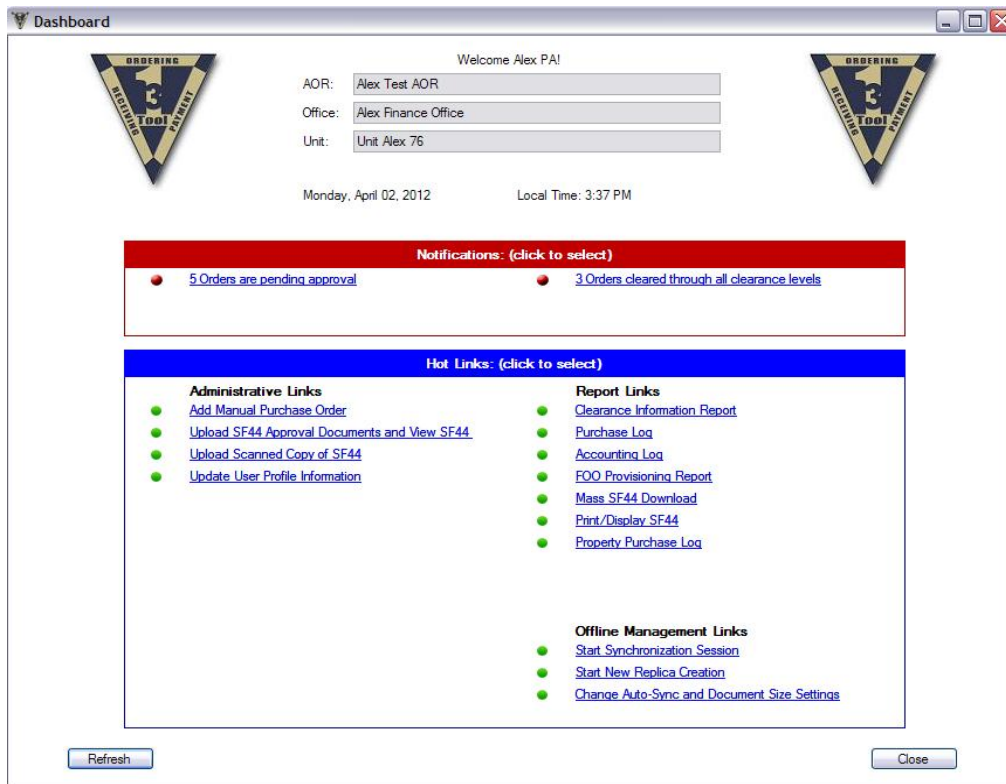
Dashboard for Paying Agents

The **Hot Links** section provides clickable shortcuts to frequently used Workstation features. For example, click **View Order Details** in the **Administrative Links** section to go directly to the *Purchase Order* window.

Review the **Notifications** section for recent updates, such as the number of FOOs who have responded to clearance flags or the number of orders pending approval. Notifications also exist to alert when a FOO is close to running out of available PIINs and when a PA is running out of available cash. Click a notification to go directly to a summary screen, which will allow the notification to be properly addressed.

The following screen shows a number of pending orders for a FOO. The FOO can select a row in the table, then click the **Open Selected PIIN** button to go to the purchase order.

FOO Pending Orders Screen

2.1.6   Workstation Menu Changes

The Workstation main menu has been re-organized for improved usability. The availability of some features remains role-dependent.

File Menu:
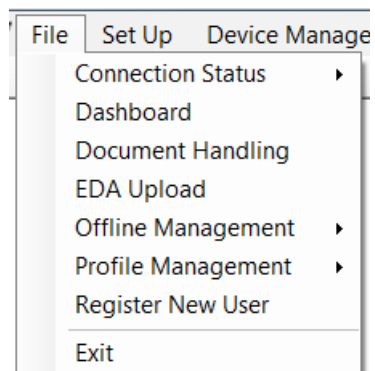
Set Up Menu (Previously called "AOR":
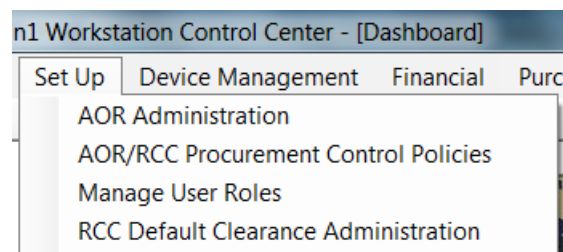
Device Management
Menu:
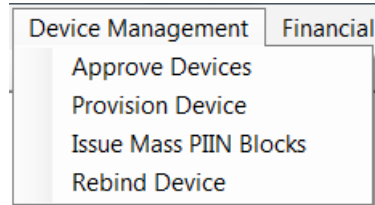
Financial Menu:
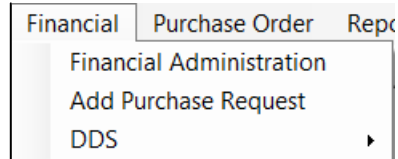
Purchase Order Menu:
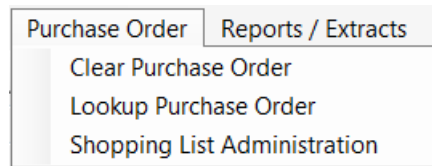
Reports Menu:
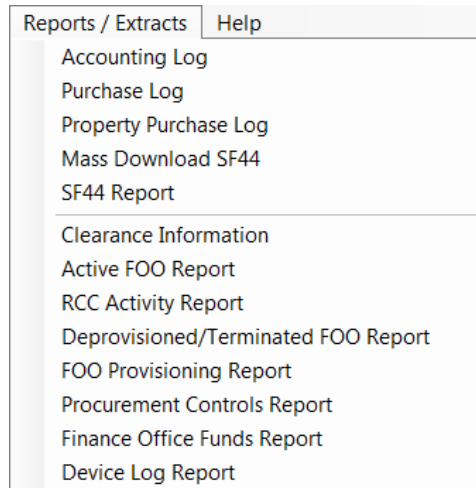
2.1.7 User Management Enhancements

2.1.7.1 User Profile Management – New Settings

The *User Profile* window provides a new **Change Certificate** button that is used to select a different signing certificate for a user (See section *2.1.2 CAC (Common Access Card) Workstation Login/Registration*). The new **Roles** button opens the *Manage User Roles* window which enables viewing and/or editing the roles assigned to a user.

To display the *Dashboard* upon user login, mark the **Load Dashboard on Start** checkbox. Leave it unmarked to display only the Workstation main menu. Dashboards display status messages and

clickable shortcut links for users who have the role of Contracting Officer (KO), Field Ordering Officer (FOO), Paying Agent (PA), Disbursing Agent (DA), or Resource Manager (RM).

The new Data Synchronization settings determine how data on a user's computer is synchronized with the 3in1 prime database, in the event that the user works offline and later returns to work online. See section *2.1.1.2 Data Synchronization Settings* for a breakdown of the new features.

User Profile Window

2.1.7.2 Changing User Roles and Office Assignments

The *Manage User Roles* window provides a new **Edit** button that allows KOs to edit a user's role and/or office assignment.

2.1.8   New Service Organization Field on Purchase Requests

On the *Add Purchase Request* window, the new **Service Organization** field enables selecting Army, Navy or Marine and entering the appropriate Line of Accounting fields, as explained earlier in section *2.1.4 Enhanced DDS Interface Support*.

2.1.9   Clearance Screen Enhancements

The RM/DA can now select orders for either a FOO or PA.

Clear Purchase Order Window for RM/DA

For other roles, the selection fields at the top of the *Clear Purchase Order* window have been rearranged for improved usability.

Clear Purchase Order Window for KO, FOO, Reviewer

2.1.10 Add or Edit Clearance to Purchase Orders

Two new options added to the FOO Responses and Clearance Status tab, on the Purchase Order screen, can be used by a KO or system administrator to add a new clearance level or edit a selected clearance level.
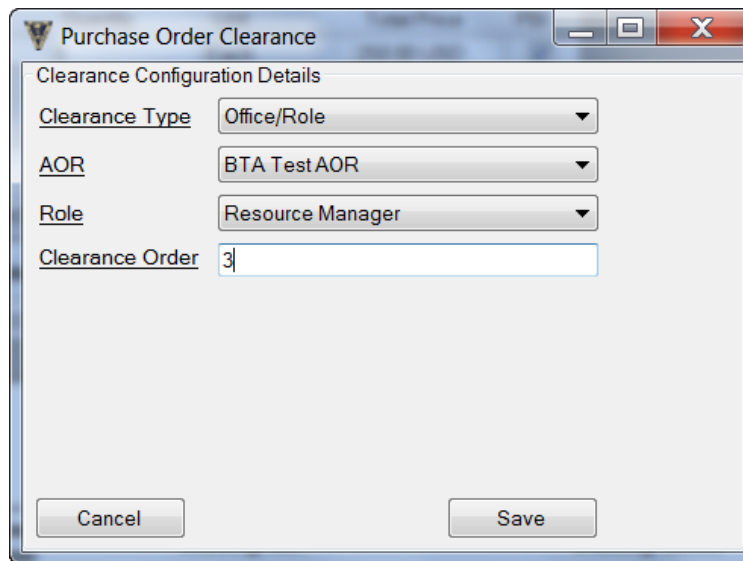
FOO Responses and Clearance Status Tab

The top table on this tab includes a new Clearance Order column, which lists the clearance levels that have reviewed the PO. The other columns provide information on the reviewer and the status. In the figure above, the first level (1) reviewer has flagged the PO. The second table, Waiting for Clearance, identifies the next level(s) of reviewer(s) waiting to review the PO.

Add New Clearance Level

Click the **Add New Clearance Level** button to add a reviewer for the PO. The *Purchase Order Clearance* window is displayed. Select the Clearance Type, AOR, Role and Order for the new reviewer. Click the **Save** button.

The new reviewer is added to the Waiting for Clearance table.

Edit Selected Clearance Level

If it is necessary to change a clearance level, click the **Edit Selected Clearance Level** button. On the *Purchase Order Clearance* window, change any of the fields and then click the **Save** button.

2.1.11 Shopping List Administration for FOOs

FOOs can create and manage shopping lists on the Workstation now, in addition to using the handheld device. Shopping lists on the Workstation and device are synchronized. Other roles can view the shopping lists on the Workstation. Shopping Lists are available on the **Purchase Order** menu.
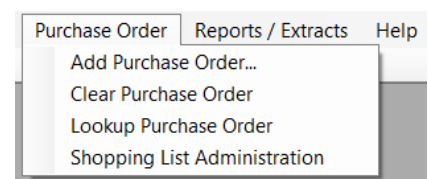
Shopping List Administration Window

2.1.12 Re-Activating FOOs

FOOs who have been deactivated, but not removed altogether from the Workstation, may be reactivated on the *Provision Device* window.

1. On the *Provision Device* window, mark the **Show Inactive Provisions** checkbox to display inactive FOOs who were at one time provisioned to the selected device.

2. Select the FOO name, then click the **Reactivate** button. This action will mark the **Active** check box beside the reactivated FOO name.
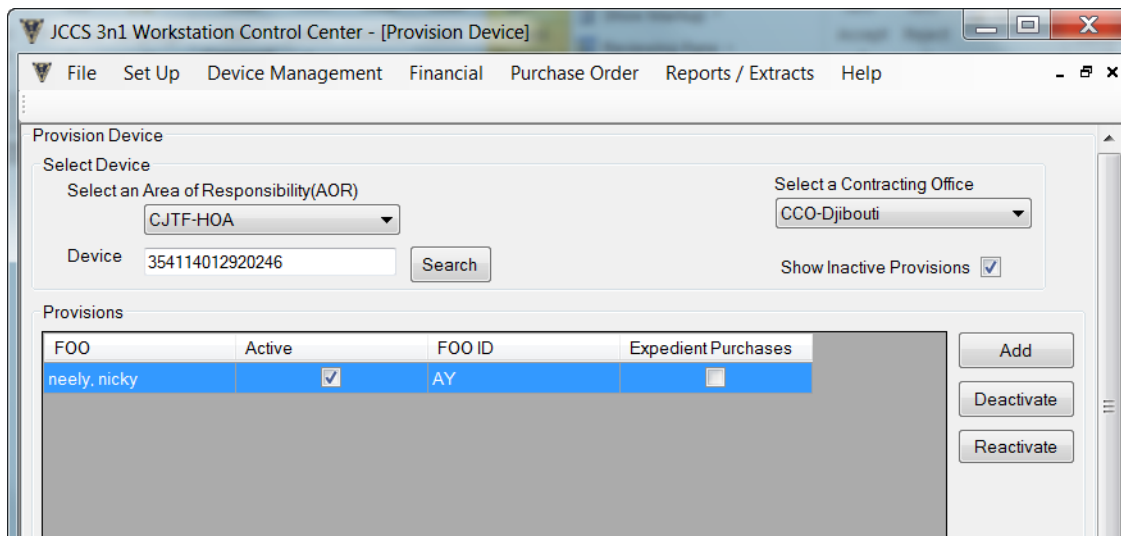
Provision Device Window – Reactivate a FOO

The reactivation action is stored in a message queue which is transmitted to the device the next time is it powered on. After receiving the message, the device adds the FOO to the list of FOOs who can log on to the device.

2.1.13 Device Information on the Device Management Window

The *Device Management* window provides new information that is transmitted from the device: Operating System (OS) Version, Application Version, G&D Chip Serial Number, G&D Software Version, and Last Ping Date.
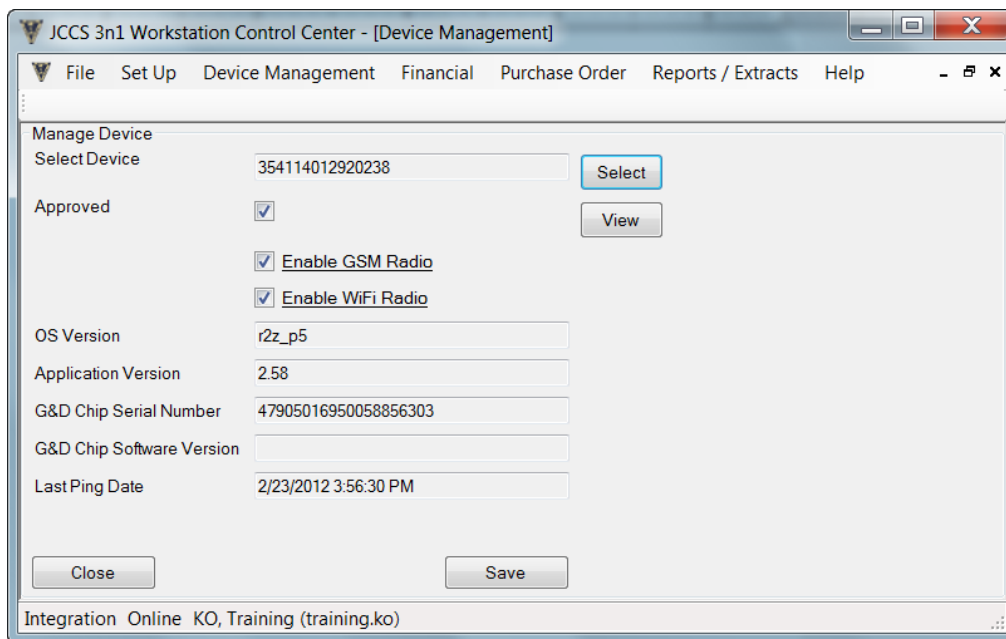
Device Management

2.1.14 Reports

- The new Device Log report is used to troubleshoot problems with the device.

- The Accounting Log, Property Purchase Log, and Purchase Log reports now display two characters in the Unit of Measure column.

2.1.15 Web-Based Features

Users can now access 3in1 web-based reporting and clearance features.

2.1.15.1 Web-Based User Registration

Updates to web-based 3in1 user registration enable new users to register in 3in1. After authenticating to the JCCS web-server using their CAC, users select **3in1** from the Quick Links drop-down list. They then select **New User** and complete the registration screens, which are identical to those in the standard Workstation version.
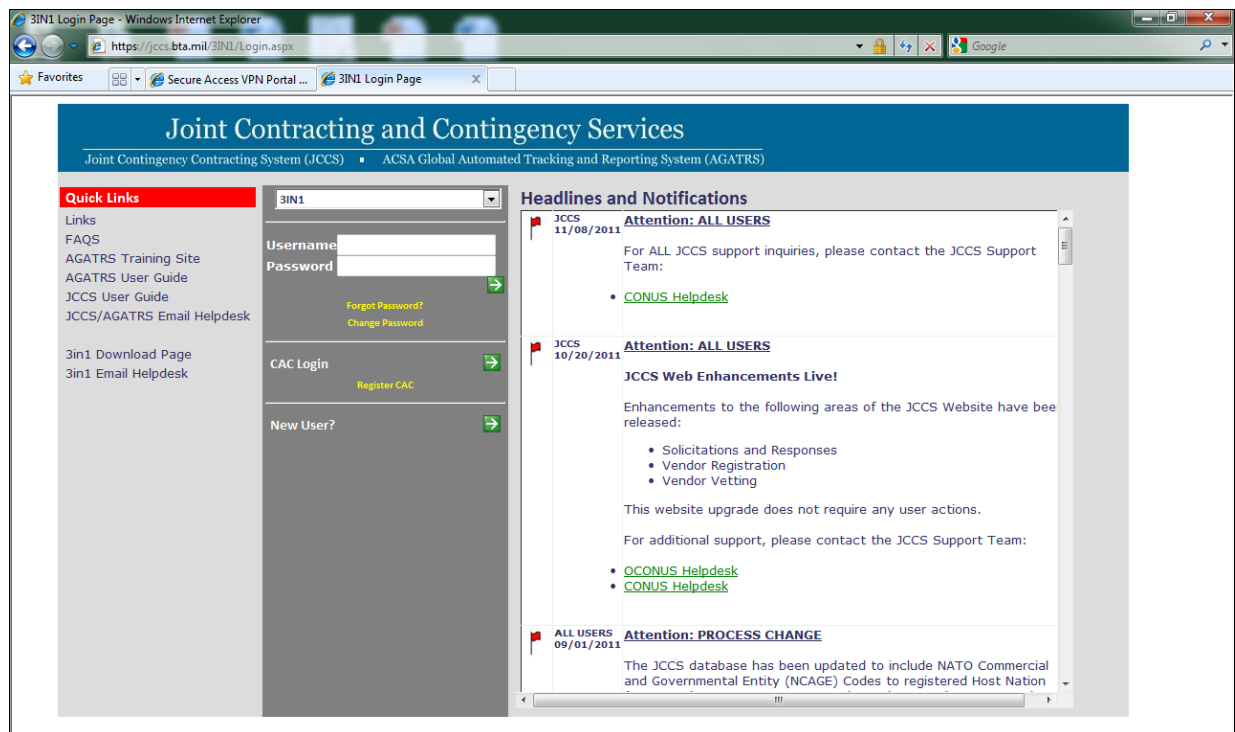
New users can register within JCCS

After a successful registration, users can log in to 3in1 via the JCCS web server, using their username and password, and access web-based reports or clearance.
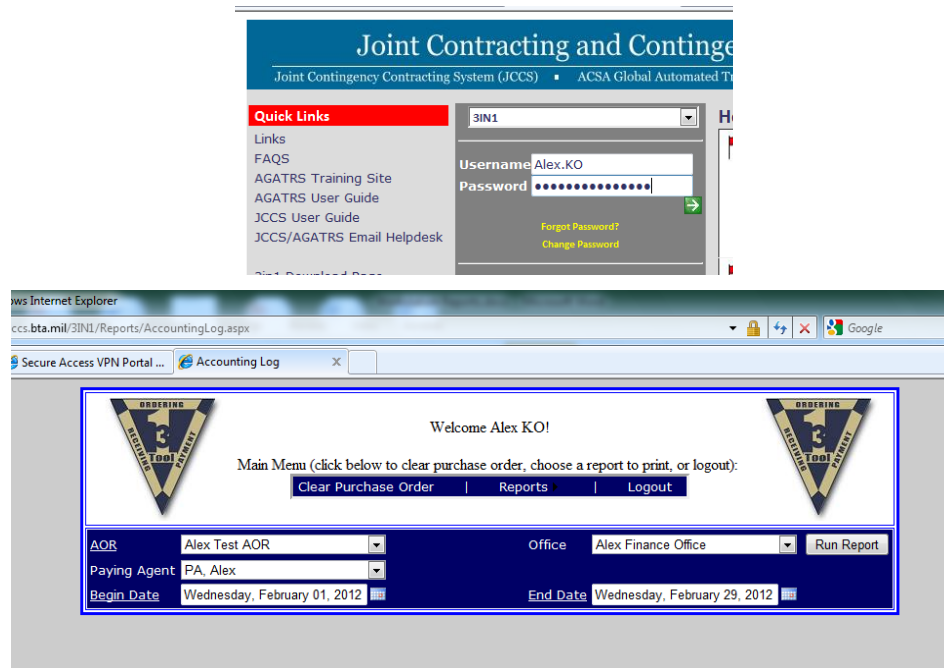
3in1 Main Menu – Users can access Reports and Clear Purchase Orders

2.1.15.2 Web-Based Reporting

Workstation reports can be generated from within JCSS. After logging in to 3in1 within JCCS, users can select Reports from the menu, then select a specific report.
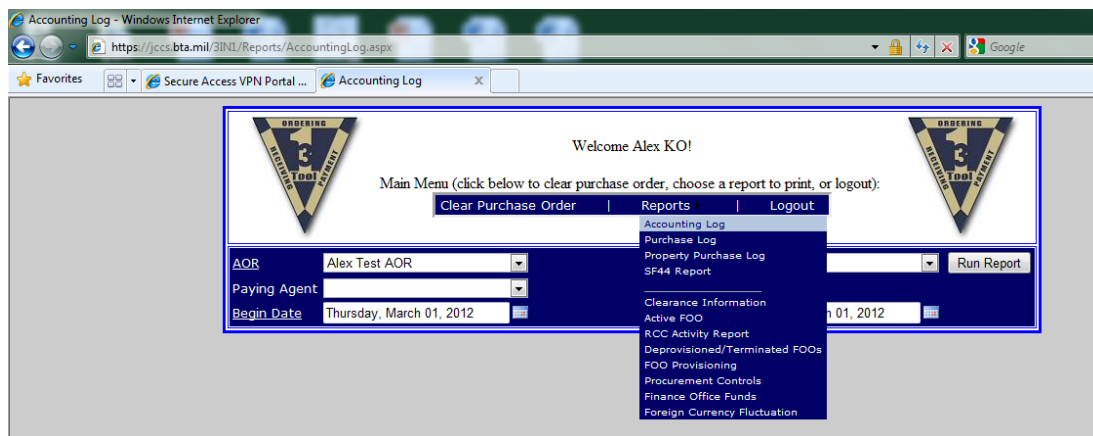
3in1 Web-based Reports Menu

Users fill in the report parameters, which are exactly the same as the standard Workstation version, then click the Run Report button. The report displays either directly in Excel or in a browser, depending on the report type. Refer to the *Reports* lesson in the 3in1 Training Guides for more information.

Accounting Log Report Parameters

2.1.15.3 Web-Based Clearance

When users log in to the web-based 3in1 system, the Clear Purchase Orders screen is displayed by default. To view purchase orders in their queue, users select an Office, Unit, FOO, and Status Filter. When they click the **Refresh** button, the clearance items are updated.

Clear Purchase Orders Screen

Users can review and approve clearance as they do using the standard Workstation version. The web site displays an acknowledgement message, shown below and the order is removed from the user's clearance queue. For other order status changes, such as flagging or disapproving an order, the web site also displays a message confirming an acknowledgment of the change.
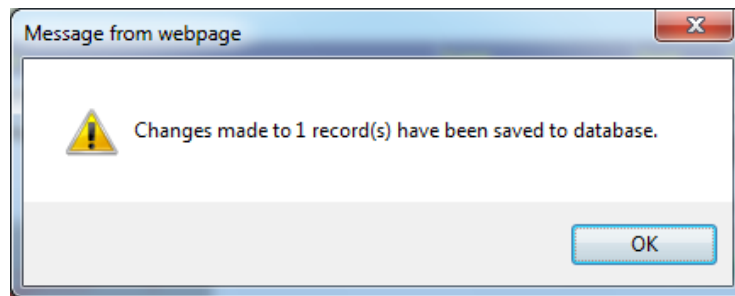
Web Site Acknowledges Approval of a Purchase Order on the Clearance Screen

New Workstation Feature	Documented in Role-Based 3in1 Training Manual			
	FOO/PA	**Contracting Officer**	**RM/DA**	**Reviewer**
Enhanced Offline Capabilities	*Module 3: Application Familiarization, Lesson 2: Managing User Account Information ; Lesson 6: Device & Workstation Direct Data Exchange*	*Module 5: Managing 3in1 Workstation Users, Lesson 2: Managing User Roles & Accounts* *Module 13: Updating Financial and Procurement Information, Lesson 3: Device & Workstation Direct Data Exchange*	*Module 3: Application Familiarization, Lesson 3: Managing User Account Information*	*Module 3: Application Familiarization, Lesson 3: Managing User Account Information*
CAC Workstation Login/Registration	*Module 3: Application Familiarization, Lesson 1: Navigating the 3in1 Workstation Application*	*Module 3: Application Familiarization, Lesson 1: Navigating the 3in1 Workstation Application*	*Module 3: Application Familiarization, Lesson 1: Navigating the 3in1 Workstation Application*	*Module 3: Application Familiarization, Lesson 1: Navigating the 3in1 Workstation Application*
Financial Administration Enhancements	*Module 8: Viewing Purchase Requests, Cash Advances & Purchases on the Workstation, Lesson 1: Viewing Financial Information*	*Module 13: Updating Financial and Procurement Information, Lesson 1: Updating Purchase Requests and Cash Advances*	*Module 9: Updating Financial Information, Lesson 1: Updating Purchase Requests*	N/A
Enhanced DDS Interface Support	N/A	*Module 7: Activating Devices for FOO/PA Teams, Lesson 1: Provisioning Devices* *Module 13: Updating Financial & Procurement Information, Lesson 1: Updating PRs & Cash Advances*	*Module 4: Issuing Purchase Requests & Cash Advances, Lesson 2: Adding PRs from the Workstation* *Module 9: Updating Financial Information, Lesson 1: Updating Purchase Requests*	N/A
Dashboards for RMs, FOOs/PAs	*Module 3: Application Familiarization, Lesson 1: Navigating the 3in1*	N/A	*Module 3: Application Familiarization, Lesson 1: Navigating the 3in1*	N/A

New Workstation Feature	Documented in Role-Based 3in1 Training Manual			
	FOO/PA	Contracting Officer	RM/DA	Reviewer
	Workstation Application		*Workstation Application*	
Workstation Menu Changes	Throughout the manual	Throughout the manual	Throughout the manual	Throughout the manual
User Management Enhancements	*Module 3: Application Familiarization, Lesson 2: Managing User Account Information*	*Module 5: Managing 3in1 Workstation Users, Lesson 2: Managing User Roles & Accounts*	*Module 3: Application Familiarization, Lesson 3: Managing User Account Information*	*Module 3: Application Familiarization, Lesson 3: Managing User Account Information*
Purchase Request Enhancements	N/A	*Module 7: Activating Devices for FOO/PA Teams, Lesson 1: Provisioning Devices from the Workstation*	*Module 4: Issuing Purchase Requests & Cash Advances, Lesson 2: Adding PRs from the Workstation*	N/A
Clearance Screen Enhancements	*Module 9: Clearing Purchase Orders, Lesson 1: Clearing Orders from the Workstation*	*Module 11: Clearing Purchase Orders, Lesson 1: Clearing Orders from the Workstation*	*Module 7: Clearing Purchase Order, Lesson 1: Clearing Orders from the Workstation*	*Module 5: Clearing Purchase Orders, Lesson 1: Clearing Orders from the Workstation*
Add or Edit Clearance to Purchase Orders	*N/A*	*Module 10: Managing POs on the Workstation, Lesson 1: Looking Up and Completing Purchase Orders*	N/A	N/A
Workstation Shopping List Administration	*Module 6: Ordering and Financial Features on the Device, Lesson 1: Shopping Lists on the Device and Workstation*	*Module 8: The Ordering Process, Lesson 1: Making a Purchase*	N/A	N/A
Re-Activating FOOs	N/A	*Module 12: Post-Clearance Operation, Lesson 2: Deactivate/Reactivate FOOs/PAs from Devices & Workstation*	N/A	N/A
Device Information on the	N/A	*Module 4: Registering New*	N/A	N/A

New Workstation Feature	Documented in Role-Based 3in1 Training Manual			
	FOO/PA	**Contracting Officer**	**RM/DA**	**Reviewer**
Device Management Window		*Devices, Lesson 1: Registering & Approving New Devices*		
Report Enhancements	*Module 12: Reporting from the Workstation, Lesson 1: Generating Reports*	*Module 14: Reporting from the Workstation, Lesson 1: Generating Reports*	*Module 10: Reporting from the Workstation, Lesson 1: Generating Reports*	*Module 6: Reporting from the Workstation, Lesson 1: Generating Reports*
Web-Based Features	*Module 2: Hardware /Application Setup, Lesson 1: Registering New Users* *Module 9: Clearing Purchase Orders, Lesson 1: Clearing Orders from the Workstation* *Module 12: Reporting from the Workstation, Lesson 1: Generating Reports*	*Module 5: Managing 3in1 Workstation Users, Lesson 1: Registering New Users* *Module 11: Clearing Purchase Orders, Lesson 1: Clearing Orders from the Workstation* *Module 14: Reporting from the Workstation, Lesson 1: Generating Reports*	*Module 2: Application Setup, Lesson 1: Registering New Users* *Module 7: Clearing Purchase Orders, Lesson 1: Clearing Orders from the Workstation* *Module 10: Reporting from the Workstation, Lesson 1: Generating Reports*	*Module 2: Application Setup, Lesson 1: Registering New Users* *Module 5: Clearing Purchase Orders, Lesson 1: Clearing Orders from the Workstation* *Module 6: Reporting from the Workstation, Lesson 1: Generating Reports*

2.2   3in1 Handheld Device Enhancements

2.2.1   Directly Connect Device to Workstation and Transfer Data

A new feature enables FOOs to connect the device directly to the Workstation and transfer order and clearance information. This is useful in situations where users must work offline for periods of time. The Workstation synchronization feature ensures the local database on the user's Workstation is synchronized with the 3in1 prime database.

Connecting the 3in1 Handheld Device to local computer for data transfer:

3in1 users in remote areas can now use the offline feature to connect the handheld device to local computer where Field Ordering Officers' offline replica exists and transfer the SF44s and associated data created while the handheld device was disconnected. Please follow the below step-by-step directions to connect and transfer the data to and from the handheld device.

1. Login as FOO on 3in1 workstation directly into Offline mode
   Note:

   - The FOO must have offline replica created on the workstation that is being used. If you do not have offline replica created, please follow the offline management steps to create offline replica.

   - The FOO can also login in online mode and then switch to offline mode.

2. Ensure the 3in1 icon for 3in1 Service Manager appears in the System Tray by the clock.
   Note:

   - Do no close the 3in1 Service Manager. Always minimize when running the 3in1 workstation in offline mode

3. On the handheld device, go to Tools > Network Settings > URL > Change it to Local Workstation
4. Connect the Ethernet adapter and cable to the handheld device
5. Connect the other end of the Ethernet cable to network adapter of the computer
6. Reboot the handheld device while the 3in1 workstation is running in offline mode and the handheld device connected via Ethernet cable to acquire an IP address for the handheld device
7. When the device comes back online, log in and trigger the upload on the device to upload/download the data.

2.2.2   Simplified Ordering Process (Pre-filled Orders)

The Pre-Filled Order feature can be used to minimize the time spent by FOO/PA teams at vendor locations. While on base or en route to the vendor, a FOO can start an order, completing as much information as possible, and then save it as a pre-filled order. Upon arrival at the merchant location, the order can be completed.

To access the *Pre-filled Order* screen:

- From the *Dashboard*, tap the **Pre-filled Order** button.

To add an order to the *Pre-filled Order* screen:

- Start an order, then at any time, tap the **Save Pre-filled Order** button on the *Order* screen.

- The order is saved on the Pre-filled Order screen and can be identified by the creation date, vendor name and total amount.

- Multiple orders can be saved.

To continue filling out a pre-filled order:

1. From the Dashboard, tap the **Pre-filled Order** button.

2. Select an order on the *Pre-filled Order* screen, then tap the **Continue Order** button.

3. Continue completing the order from the point where you saved it.

Note an order can be saved as a prefilled order and continued more than once.

If you decide that a pre-filled order will not be completed, select the order and tap the **Delete Order** button.

2.2.3   Handling Insufficient Funds

The 3in1 Tool is designed to monitor available cash. As line items are added to an order, the available cash amount decreases. An order will be blocked at the time of check out, if the order total exceeds the available cash on hand. If the order subtotal exceeds the available cash, the line item(s) are flagged in red.

The total amount is red when an item added to an order exceeds the available cash.	**The order total exceeds the available funds. Note the Available Cash amount is negative.**	

A message blocks the attempted check out. The FOO must take corrective action in order to balance the numbers, such as adjusting the item price or applying a discount.

2.2.4   Reprovisioning FOO Data to the Device

If all data is lost on the device, such as when a reset to factory settings occurs, the Workstation can be used to reprovision the device and transmit data to the device. During reprovisioning on the device, the FOO has a choice of downloading all orders from the Workstation or only recent orders that were placed using active purchase requests.

2.2.5 Access Point Name (APN) Settings for GSM-Enabled Devices

If you are using GSM and need to configure the device, it is necessary to select or set up the Access Point Name (APN) using technical information from the GSM provider. On the device *General Settings* screen select **APN Settings**.

On the *Edit Access Point* screen, populate each field with data supplied by the GSM provider. Tap **Save** to create the access point using the specified name.
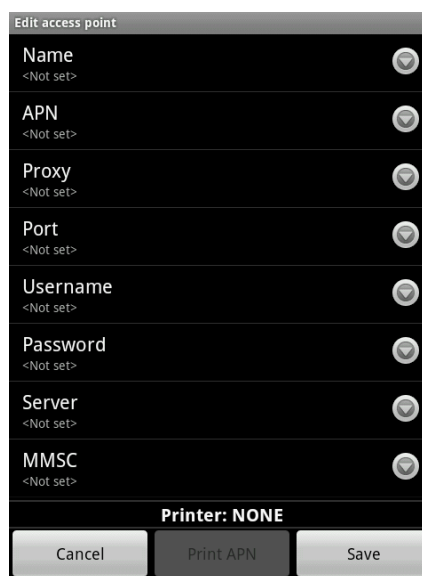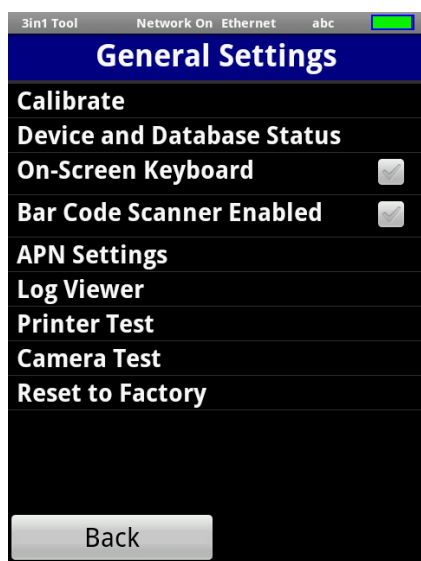
If APNs are already defined, the list is displayed on the *APNs* screen, as shown below. To select an APN, simply tap the button beside it. A green dot identifies the selected APN.
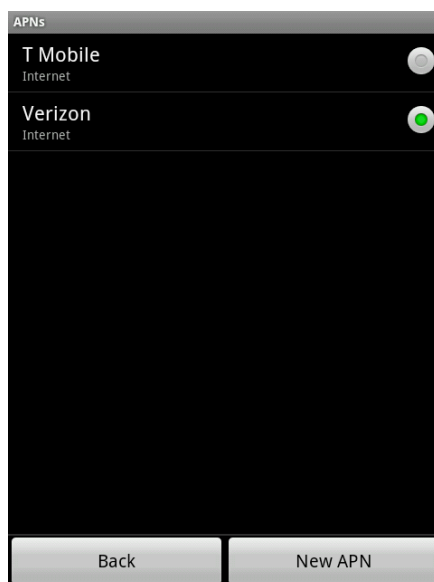
2.2.6   Weather Forecasts

Weather reports can be generated for a specific area and then stored. Weather is a new option on the Utilities menu. Use either GPS coordinates or a city name to obtain weather reports. Network connectivity and a GPS-enabled device are required in order to generate a weather report.

New/Updated Device Feature	Documented in Role-Based 3in1 Training Manual			
	FOO/PA	Contracting Officer	RM/DA	Reviewer
Directly Connect Device to Workstation & Transfer Data	*Module 3: Application Familiarization, Lesson 6: Device and Workstation Direct Data Exchange*	*Module 13: Updating Financial and Procurement Information, Lesson 3: Device and Workstation Direct Data Exchange*	N/A	N/A
Procurement Control Changes	*Module 14: 3in1 Device Tools & Settings, Lesson 1: Device Tools*	*Module 8: The Ordering Process, Lesson 1: Making a Purchase*	N/A	N/A
Handling Insufficient Funds	*Module 5: The Ordering Process, Lesson 2: Making a Purchase*	N/A	N/A	N/A
Reprovisioning FOO Data to the Device	*Module 13: Device Management Tools, Lesson 3: Reprovisioning Device Data*	*Module 12: Post-Clearance Operations, Lesson 3: Reprovisioning Device Data*	N/A	N/A
Weather Forecasts	*Module 14: 3in1 Device Tools & Settings, Lesson 1: Device Tools*	*Module 16: 3in1 Device Tools & Settings, Lesson 1: Device Tools*	N/A	N/A

3   What's New in 3in1 Version 2.5

3.1   3in1 Workstation Enhancements

3.1.1   Dashboards for Contracting Officers and Disbursing Agents

When a Contracting Officer (KO) or Disbursing Agent (DA) logs in to the Workstation, the *Dashboard* is displayed. It is customized for each user. The top portion displays your assigned AOR, office and unit. In addition, the number of units and FOOs (for KOs) or PAs (for DAs) that you manage are displayed.
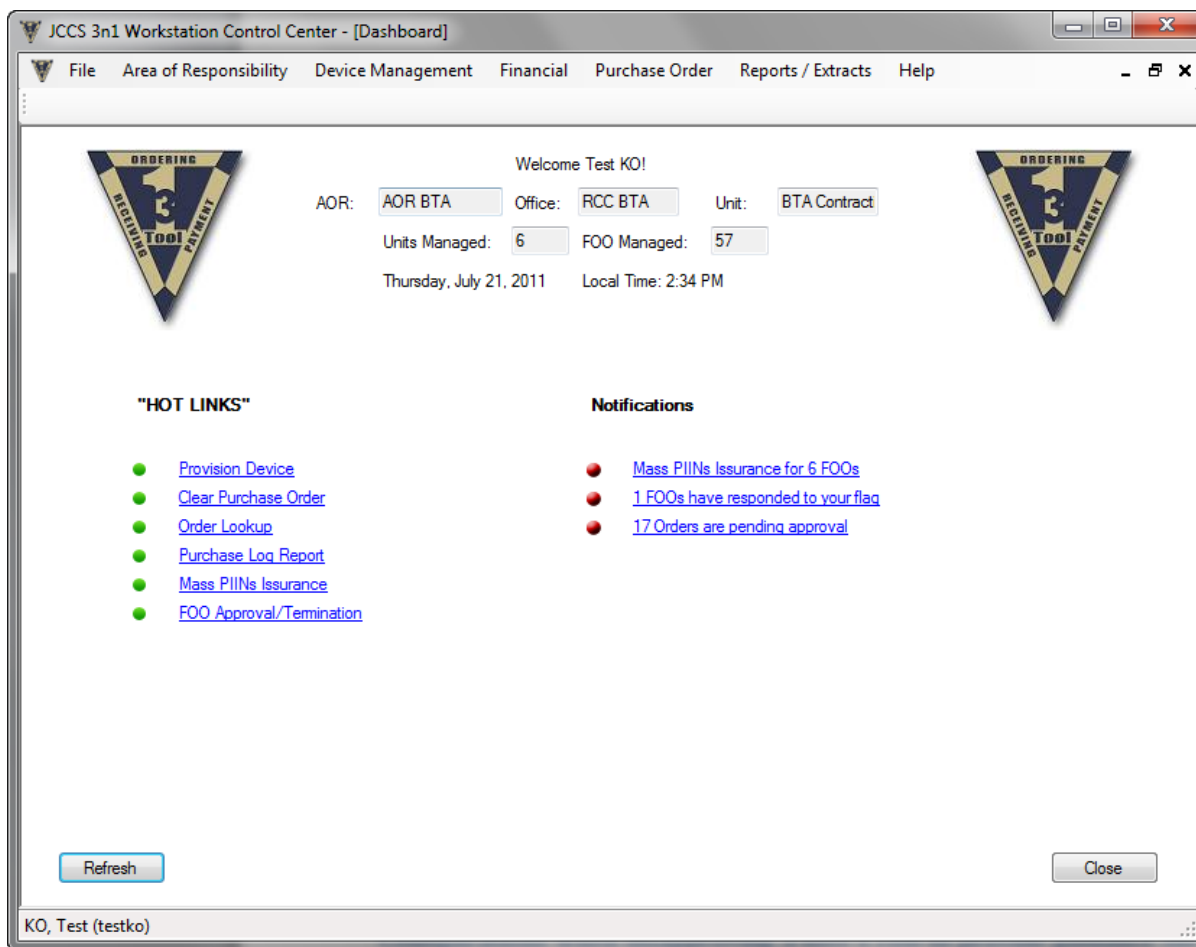
Dashboard for Contracting Officers
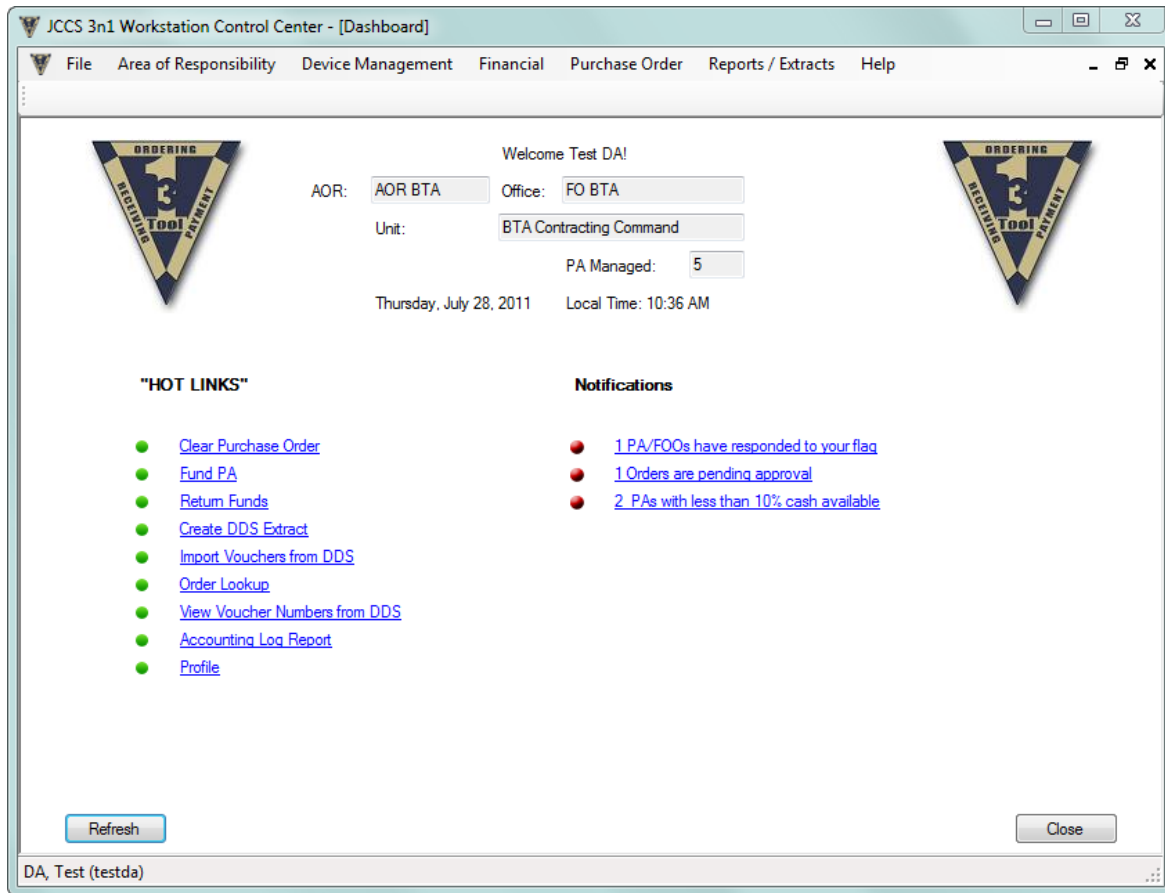
Dashboard for Disbursing Agent

The **HOT LINKS** section provides clickable shortcuts to frequently used Workstation features for a KO or DA. For example, click **Order Lookup** to go directly to the *Purchase Order Lookup* window.

Review the **Notifications** section for recent updates, such as the number of FOOs who have responded to clearance flags or the number of orders pending approval. Click a notification to go directly to the relevant area of the program. For example, to clear pending purchase orders, click the "*x* Orders are pending approval" notification. You can then select from a list of FOOs with one or more pending orders and then go to the *Clear Purchase Order* screen.

To update the *Dashboard* at any time, click the **Refresh** button in the bottom left corner. You may leave the *Dashboard* open while accessing other areas of the program using the menu bar. To close the *Dashboard*, click the **Close** button in the bottom right corner. To re-open the *Dashboard*, select **File**, **Dashboard**.
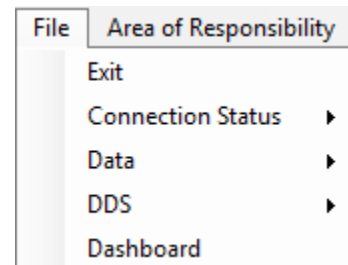
3.1.2   Financial Administration

3.1.2.1 Automatic PR Closeout upon PR Decommitment

A new **Closeout Purchase Request** checkbox on the *Decommit Purchase Request* window provides the option to automatically close out a PR after a successful decommitment of funds. This saves users an extra step of using the **Close PR** button.

3.1.2.2 Automatic De commitment of PR

Purchase requests are automatically decommitted if the handheld device verifies that the PR balance is sufficient to support the decommit. This eliminates the extra steps of having the Workstation user use the **Decommit** button on the *Purchase Request Administration* window after the device verifies there are sufficient funds to de-commit.

3.1.2.3 Authorize/De-Authorize PAs to Initiate Cash Advances from the Device

Paying Agents may initiate cash advances from the handheld device only if they have permission. The KO provides this permission on the *Entity Profile Management* window; see the following section for details.

3.1.2.4 Edit Purchase Requests

Disbursing Agents or Resource Managers may edit a purchase request using the Edit PR button on the Purchase Request Administration window.

The fields that can be edited: **PR Number, Description, Line of Accounting**.

3.1.3   Entity Profile Updates

3.1.3.1 Email Notification Option

The 3in1 system generates email notifications during the clearance process. When one reviewer finishes and approves a PO, it is sent to the next reviewer's queue, based on the clearance configuration that has been established using the Provision Device feature. Typically, a notification email is sent to the next reviewer. A valid email address must be provided on the *Entity Profile Management* window, and the **Receive Email Notifications** check box must be marked.

To set up email notification for a user, select **AOR**, **Entity Profile Management** from the menu bar. Select a user and then click the **Edit** button. Mark the **Receive Email Notifications** check box. If it is unmarked, the user will not receive 3in1 system-generated emails. Click the **Save** button.

3.1.3.2 Authorize/De-Authorize PA to Initiate Cash Advances from the Device

PAs may initiate cash advances from the handheld device only if they have permission. The KO provides this permission on the *Entity Profile Management* window, which is accessed by selecting **AOR**, **Entity Profile Management**. Select a Paying Agent and click the **Edit** button. Mark the **Allow Device Originated Cash Advance** check box. If it is unmarked, the PA cannot initiate a cash advance from the device. The *Entity Profile Management* window is shown below.

3.1.3.3 Users can change Unit Assignments

Users may change their unit assignment on the *Entity Profile Management* window. Click the **Edit** button. Click the **Change Unit** button. On the *Select Unit* window, select a unit. Click the **Save** button.

3.1.4   Purchase Orders Updates

3.1.4.1 New Fields Added to Look Up PO Window, Signatures Tab

New fields have been added to the **Signatures** tab: EDA Queue Date, EDA Sent Date, Schema Version, Cancelled Date, Cleared Date.

3.1.4.2 Display UPC/barcode for purchase order items uploaded from device

The handheld device bar code scanner is a newly enabled 3in1 feature. If a FOO scans a UPC for a purchase item, the UPC/bar code is displayed in the Bar Code column on the *Lookup Purchase Order* screen, on the **Purchase Items** tab. This field is optional.

3.1.5   Reports

3.1.5.1 SF44 Displays Foreign Currency

If order payment is made using a foreign currency, the SF44 now displays the paid amount in the foreign currency in the "Payment in the Amount of" block. Previously, only the USD and exchange rate were displayed.

3.1.5.2 Property Purchase Log Report

A new column displays UPC codes for purchase items if they were scanned using the 3in1 handheld device's bar code scanner feature.

3.1.6   Expanded Select User Filter

The *Select User* window that appears in multiple areas of the Workstation has a new search filter that enables searching for users by AOR/Office Assignment.

3.1.7   Other Workstation Changes

3.1.7.1 AOR Administration Visibility Restrictions

Users can view only the information related to their assigned AORs. Users may not access information pertaining to

AORs to which they are not assigned.

3.1.7.2 Detailed Messages to Maintain Data Integrity

In several areas of the Workstation, users may inadvertently create problems by using a delete action. Messages now inform users of the potential negative effects of using a command, and in some cases, prevent the command from being used.

Deleting Procurement Policy

If a KO attempts delete a procurement policy that has been assigned to provisions, the following message displays and the deletion does not occur. The KO will have to unassign the policy from all provisions, then return to the *Procurement Control Policy Administration* window and delete the policy.
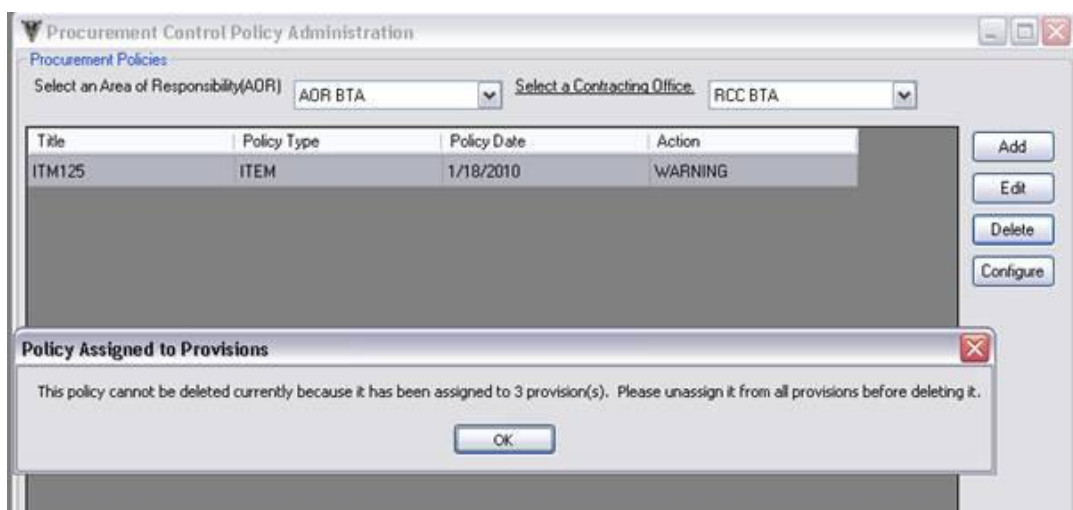
Removing User Roles

System administrators can disapprove roles or delete roles for a user on the *Manage User Roles* window.
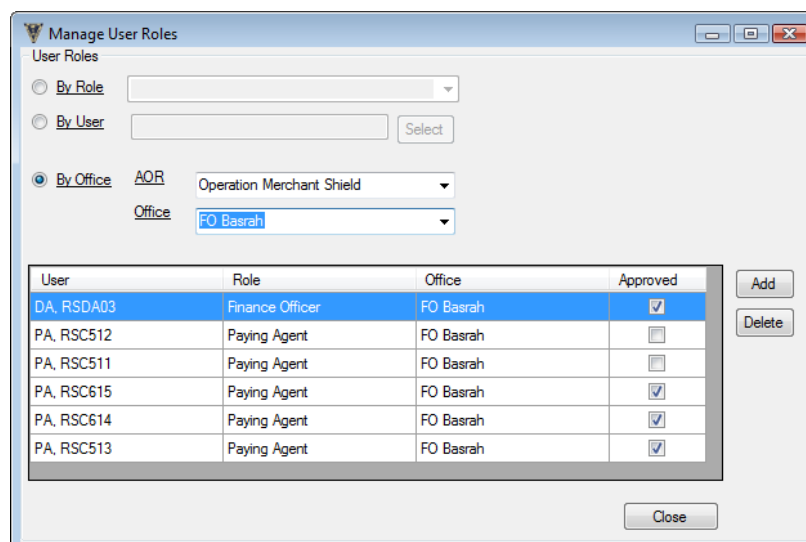
To disapprove a role, unmark the **Approved** checkbox. If an individual has been assigned to a clearance configuration and has pending orders, a warning message is displayed. The administrator can proceed with the disapproval by clicking the Yes button.
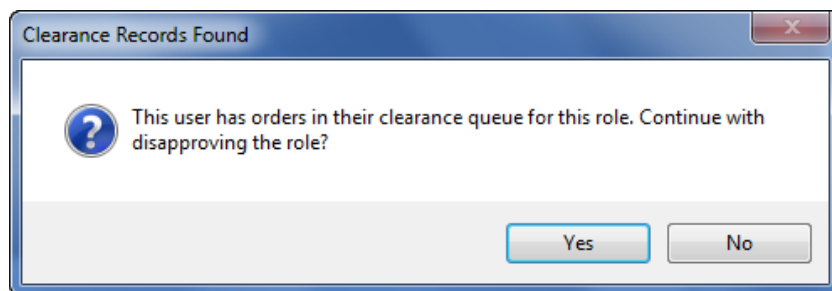
To remove a role from a user, select the user and then click the **Delete** button.

If an individual has been assigned to a clearance configuration, a warning message (shown below) states the individual cannot be removed from the role. The administrator must first go the Provision Device window, Clearance Configuration tab and remove the individual from all clearance configurations. Then the Delete button may be used to remove the user from the role.
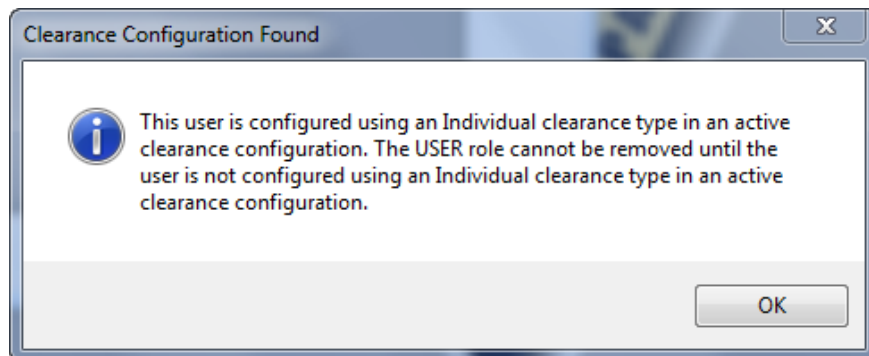
If a user is the only one assigned to a role that is assigned as an Office/Role clearance type in a clearance configuration, a message is displayed indicating the user cannot be deleted. However, if more than one person is assigned the role in the same office, the deletion is allowed.

	Documented in Role-Based 3in1 Training Manual			
New/Updated Workstation Feature	**FOO/PA**	**Contracting Officer**	**RM/DA**	**Reviewer**
KO/DA Dashboard	**N/A**	Module 3: Application Familiarization, Lesson 1: Navigating the 3in1 Workstation Application	Module 3: Application Familiarization, Lesson 1: Navigating the 3in1 Workstation Application	**N/A**
Financial Admin Updates				
Automatic PR Closeout upon PR Decommitment	**N/A**	Module 13: Updating Financial and Procurement Information, Lesson 1: Updating PRs and Cash Advances	Module: Updating Financial Information, Lesson 1: Updating PRs	**N/A**
Automatic Decommitment of PR	**N/A**			**N/A**
Edit Purchase Request Button	N/A	N/A	Module 9: Updating Financial Information, Lesson 1: Updating Purchase Requests	N/A
Entity Profile Updates				
Email Notification Option	Module 3: Application Familiarization, Lesson 3: Managing User Account Information	Module 5: Managing 3in1 Workstation Users, Lesson 2: Managing User Roles and Accounts	Module 3: Application Familiarization, Lesson 3: Managing User Account Information	Module 3: Application Familiarization, Lesson 3: Managing User Account Information
Authorize PA to Initiate Cash Advances from the Device	Module 19: Managing Cash Advances on the Device, Lesson 1: Working with Cash Advances		Module 9: Updating Financial Information, Lesson 3: Managing Cash Advances on the Handheld Device	**N/A**
Change Unit Assignments	Module 3: Application Familiarization, Lesson 3:		Module 3: Application Familiarization, Lesson 3:	Module 3: Application Familiarization, Lesson

New/Updated Workstation Feature	Documented in Role-Based 3in1 Training Manual			
	FOO/PA	**Contracting Officer**	**RM/DA**	**Reviewer**
	Managing User Account Information		Managing User Account Information	3: Managing User Account Information
Purchase Orders New Fields	Module 7: Managing POs in the Workstation, Lesson 2: Looking Up and Completing POs	Module 10: Managing POs on the Workstation, Lesson 2: Looking Up and Completing POs	Module 6: Managing POs in the Workstation, Lesson 2: Looking Up and Completing POs	Module 5: Clearing Purchase Orders, Lesson 2: Lookup Purchase Orders
Reports Updates	Module 12: Reporting from the Workstation, Lesson 1: Generating Reports	Module 14: Reporting from the Workstation, Lesson 1: Generating Reports	Module 10: Reporting from the Workstation, Lesson 1: Generating Reports	Module 6: Reporting from the Workstation, Lesson 1: Generating Reports
Expanded Select User Filter	N/A	Module 4: Managing 3in1 Workstation Users, Lesson 3: Logging in to the 3in1 Workstation	N/A	N/A
AOR Administration Visibility Restrictions	Module 3: Application Familiarization, Lesson 4: Viewing AOR Information and Policies	Module 6: Configuring the 3in1 Tool Workstation, Lesson 1: AOR Setup	Module 3: Application Familiarization, Lesson 3: Viewing AOR Information and Policies	**N/A**
Detailed Messages to Maintain Data Integrity	**N/A**	Module 5: Managing 3in1 Workstation Users, Lesson 2: Managing User Roles and Accounts Module 6: Configuring the 3in1 Tool Workstation, Lesson 2: Defining Procurement Control Policies	**N/A**	**N/A**

3.2   3in1 Handheld Device Enhancements

3.2.1   Bar Code Scanner

The bar code scanner located on the top of the handheld device.

Scanner shown in top view of the device
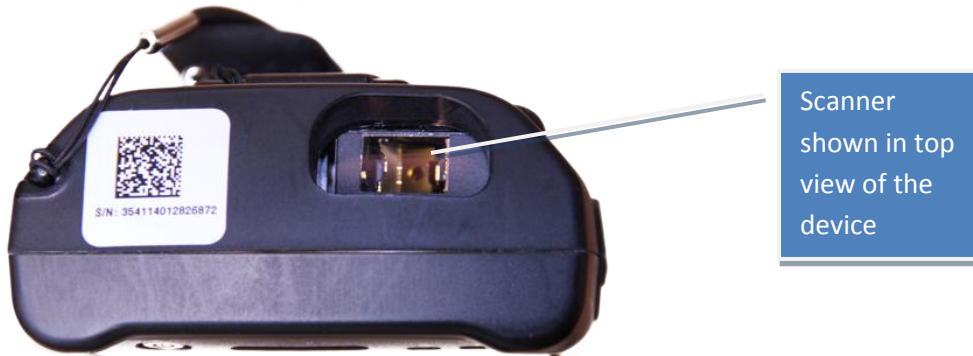
Use the scanner to scan UPC numbers on items being purchased. It is necessary to first enable the bar code feature by selecting the **Bar Code Scanner Enabled** checkbox on the startup *General Settings* screen or on the **Tools** tab, under **General Settings**.

During the purchase process, click inside the new **UPC** field on the *New Item* screen. Then scan the bar code by positioning the top of the device about 1 to 5 inches over the bar code and clicking one of the yellow buttons on the front or sides of the device. The UPC numbers are captured in the new **UPC** field on the *New Item* screen.
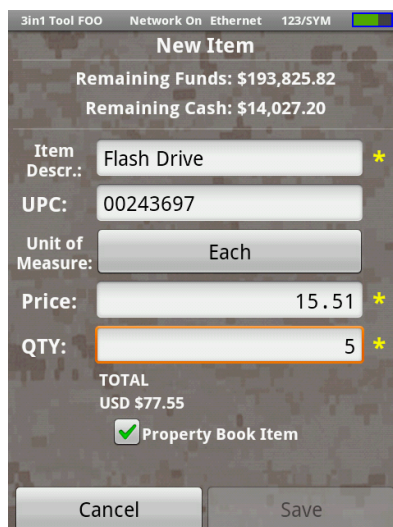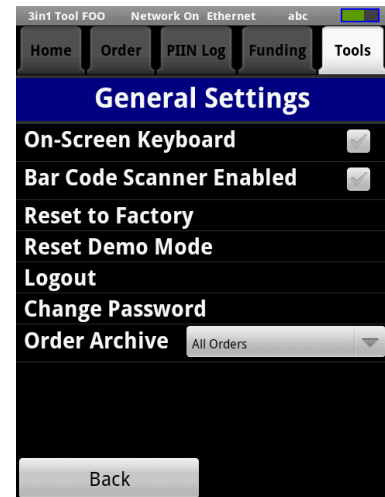
3.2.2 Pre-filled Order Feature

The Pre-Filled Order feature can be used to minimize the time spent by FOO/PA teams at vendor locations. While on base or en route to the vendor, a FOO can start an order, completing as much information as possible, and then save it as a pre-filled order. Upon arrival at the merchant location, the order can be completed.

FOOS start an order, and then at any point, click the **Save Pre-filled Order** button on the *Order* screen. The order is saved on the *Pre-filled Order* screen and can be identified by the creation date, vendor name and total amount. Multiple orders can be saved.

To continue filling out a pre-filled order, from the *Dashboard*, click the **Pre-filled Order** button. Then select an order on the *Pre-filled Order* screen, then click the **Continue Order** button. Continue completing the order from the point where you saved it.

Incomplete orders can be deleted from the Pre-filled Order screen.

3.2.3   New Device-Based Reports

The following new reports can be printed from the device. The FieldPro RT43 printer must be connected and powered on in order to print the reports.

Cash Advance Ledger and Cash Advance Details Reports - From the Purchase Request Details screen, click the **Print Orders** button to print the Cash Advance Ledger, which shows the activity history of a cash advance and a running balance. Click **the Print Cash Advances** button to print the Cash Advance Details report. A printer must be connected to the device in order for these two buttons to be active.

The following figure shows sample printouts of both reports.

You can also print reports from the *Cash Advance Details* screen. Click the **Print Details** button to print the Cash Advance Details report. Click the **Print Ledger** button to print a Cash Advance Ledger report, which shows the activity history of a cash advance.

Log Viewer – Accessed from the device **Tools** menu, the Log Viewer is a de-bugging tool to be used by technical support. In the unlikely event that the device fails, error messages will display on the screen. If the printer is attached to the device, print the report. Reporting these errors helps improve future releases of the 3in1 Tool.

3.2.4   Startup General Settings Screen

When a user selects the **General Settings** button on the *Out of the Box* or *FOO Login* screen, the *General Settings* screen provides a list of options that are useful when first using the device:

Calibrate: Ensures the coordinates of the point of contact with the screen are the same coordinates read by the software. Touch the cross-hairs that appear on the screen. When the calibration tool is launched, do not turn off the device without completing the process.

Device and Database Status: Displays key information about the device, including the IP address, WiFi Mac address, device ID, software and hardware versions, and storage amount.

On-Screen Keyboard: Toggle the on-screen keyboard on/off by marking/unmarking the checkbox.

Bar Code Scanner Enabled: Enables/Disables the device bar code scanner feature, which is used to capture UPC numbers of items purchased.

Log Viewer: A de-bugging tool to be used by technical support.

Printer Test: Prints a test page if the small printer is connected to the device.

Camera Test: Enables users to detect and resolve camera issues before going to a merchant's location.

Reset to Factory: Reserved for use by system administrators only
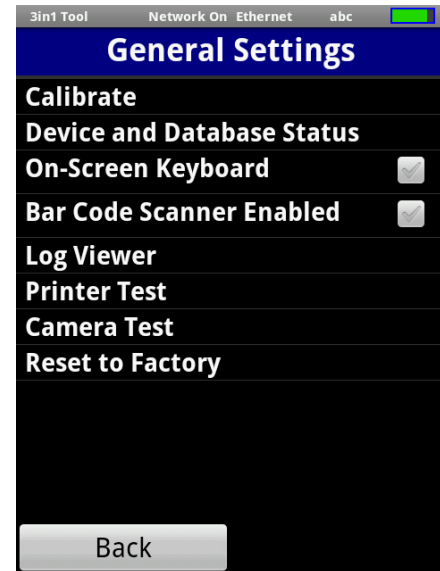
3.2.4.1 General Settings on the Tools Tab

Note there is a second *General Settings* screen that displays when you select **General Settings** on the device **Tools** tab. This screen features a different set of options than the *General Settings* screen shown above.

Reset Demo Mode: Select if you have used Demo Mode to practice entering data and want to erase the data and start over.

Logout: Logs the current user out of the 3in1 device application.

Change Password: Change the password for the current user for logging in to the device.

Order Archive: Filters orders that are displayed on the PIIN Log screen. Set the archive level to view all orders or only orders placed within the last 14, 30, or 60 days. The calculation is made from the time a PIIN was issued.

The other options on the initial *General Settings* screen (**Printer Test**, **Camera Test**, **Calibrate, Device and Database Status**, and **Log Viewer**) can be accessed from the **Tools** tab.
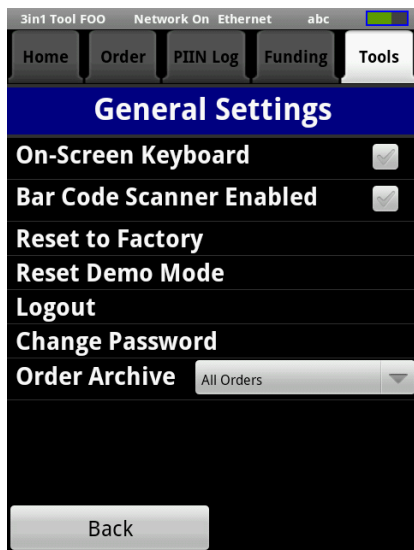
3.2.5　Remaining Funds vs. Available Cash

A distinction is now made on the device screens between Remaining Funds and Available Cash. For example, the Order screen below shows a summary at the top, consisting of the selected merchant name, PR description, remaining funds, and available cash.

Remaining Funds refers to the amount of physical cash remaining in the PA's pocket. However, there may be orders that have been made, but not paid yet, so the Available Cash to spend may be less than the physical cash-in-pocket.

In a related change, on the Dashboard and other device screens, the "Remaining" column name has been changed to "Available."

3.2.6   Changes to the Funding Screen Before and After Payment

Once an order is placed, the order amount is categorized as "Awaiting Payment" in the Available Funding column of the Funding screen. In the example below, an order has been placed for the sum of

$535.57. However, payment has not been made yet, nor have the items been received. On the Funding screen, the order amount is displayed in the Available column, but as a separate "Awaiting Payment" amount.

After the Paying Agent pays for the order, on the Funding screen, the order amount is subtracted from "Awaiting Payment" in the Available column and added to the Expended column.

Post-Order/Pre-Payment Funding Screen

Post-Payment Funding Screen

3.2.7   Device Operating System Updates

The 3in1 device consists of the 3in1 software application running on the Google Android operating system. Previously only 3in1 software updates could be received and downloaded through the Software Update feature on the 3in1's *Device and Database Status* screen. Now, operating system updates also may be downloaded.

	Documented in Role-Based 3in1 Training Manual			
New/Updated Device Feature	**FOO/PA**	**Contracting Officer**	**RM/DA**	**Reviewer**
Bar Code Scanner	Module 5: The Ordering Process, Lesson 2: Making a Purchase	Module 8: The Ordering Process, Lesson 1: Making a Purchase	Module 10: Reporting from the Workstation, Lesson 1: Generating Reports	Module 6: Reporting from the Workstation, Lesson 1: Generating Reports
Pre-filled Order	Module 6: Ordering and Financial Features on the Device, Lesson 3: Pre-filled Orders	Module 8: The Ordering Process, Lesson 1: Making a Purchase	N/A	N/A
Device-Based Reports	Module 11: Reporting from the Device, Lesson 1: Printing Reports from the Device	Module 9: Ordering Features on the Device, Lesson 2: Managing Cash Advances on the Handheld Device	N/A	N/A
Startup General Settings Screen	Module 3: Application Familiarization, Lesson 5: Navigating the 3in1 Device Application	Module 4: Registering New Devices, Lesson 1: Registering and Approving New Devices	N/A	N/A
Remaining Funds vs. Available Cash	Module 5: The Ordering Process, Lesson 2: Making a Purchase	Module 8: The Ordering Process, Lesson 1: Making a Purchase		N/A
Changes to the Funding Screen Before and After Payment	Module 5: The Ordering Process, Lesson 2: Making a Purchase	Module 8: The Ordering Process, Lesson 1: Making a Purchase		N/A

4   What's New in 3in1 Version 1.9

4.1   3in1 Workstation Enhancements

4.1.1   New Reports/Extracts

The following new workstation reports have been added to the Reports/Extracts menu. Each generated report can be viewed onscreen in a grid format. The information can sorted and filtered on screen or exported to Excel for further analysis and printing.

1. **Clearance Information**: Provides a detailed report on the clearance status for all orders associated with an RCC.
2. **Finance Office Funds**: Management report used by the DA to view the funds (cash) information for all of the PAs who still have cash on hand.
3. **RCC Activity**: Management report used by the KO to view Clearance information, total number of orders and dollar value, and active FOOs.
4. **Active FOO:** Lists the names of active FOOs at a specified AOR contract office, providing their contact information, assigned handheld device serial numbers, associated PA, and latest order information. A FOO is considered active if they are currently assigned to a device.
5. **Deprovisioned/Terminated FOOs:** Prints a list of inactive FOOs at a specified AOR office. The FOO contact information, termination date, and order information are listed in spreadsheet format.
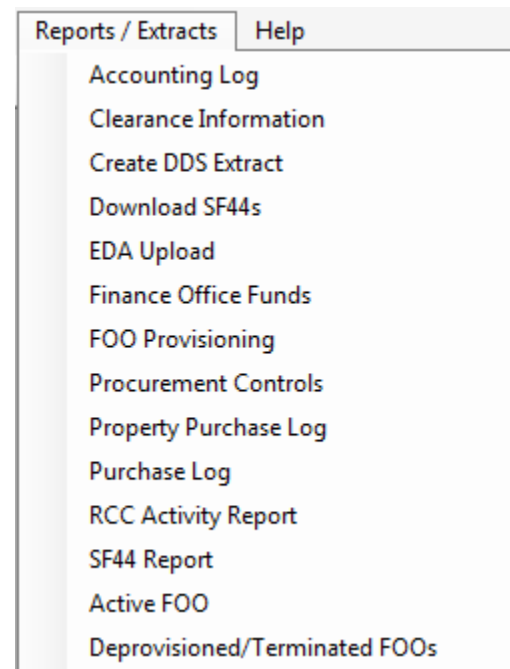
The following figure shows the available filters for the RCC Activity report. After a filter is selected, the onscreen report results are displayed immediately.
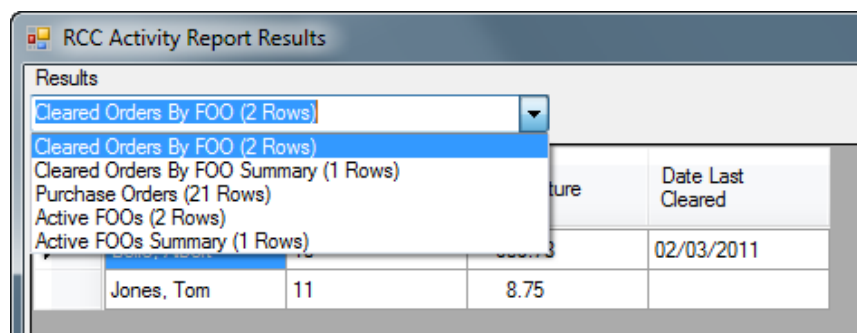
The following table lists the contents of each new report.

Report Title	Data Columns displayed in the report
Clearance Information	Contract Office, PIIN #, FOO, PA, Clearance Order, Clearance Type, who the order is Waiting On, how long it has been Waiting for review, Status, and who last Reviewed the order
Finance Office Funds	PA Name, Cash Advance Sequence Number, Cash on Hand, Initial Cash Advance Amount, Date Last Order Cleared, Date Cash Advanced, Email, Phone Number, Unit
RCC Activity	
Cleared Orders by FOO	FOO, Order Count, Total Expenditure USD, Date Last Cleared
Cleared Orders by FOO Summary	FOO Count, Order Count, Total Expended
Purchase Orders	Status, Contract Office, PIIN, FOO, PA, Order Date, Ordered by Organization, Received by, Payee, Total, Currency Code, Exchange Rate, Payment Request, Payment Received, Discount Days
Active FOOs	FOO, Device Serial Number, GSM Radio Enabled, WiFi Radio Enabled
Active FOOs Summary	FOO Count, Active Device Count
Active FOO	FOO, FOO ID, Email, Phone #, Appointment Date, Re-Deployment Date, Last Date Order Cleared, # Orders Placed, Total Amount Orders Placed, Serial Number, # Manual Issued PIINs, # Manual Issued PIINs available, # Device Issued PIINs, # Device Issued PIINs Available, GSM Active, WiFi Active, Unit, UIC, PA
Deprovisioned /Terminated FOOs	FOO, FOO ID, Termination Date, # Orders Placed, Total Amount Orders Placed, Unit, UIC, Email, Phone Number

4.1.2 EDA Upload

EDA Upload is a command on the Reports/ Extracts menu. Use it to extract data from cleared purchase orders and sends to the Global Exchange Service (GEX), which will automatically send the data to Electronic Data Access (EDA). The purchase process is not completed until the SF44 data is archived in EDA. EDA Upload can be accessed only by users who have the assigned roles of Contracting Officer, Disbursing Agent or Administrator.

4.1.3   Provisioning Progress Bar

The new Completion Progress bar at the bottom of the Provision Device window enables monitoring KO progress in completing the provisioning process.

When a provisioning tab is completed, the associated check box is marked and the progress bar is filled with more green, to indicate the degree of completion. When all tabs are filled in, the progress bar shows 100% completion (the entire bar is filled with green). Note: the minimum information required to activate a device is FOO and PIINs. The rest of the information can be added at a later time, however the device must synchronize with the prime database to obtain the rest of the information before orders can be placed on the device.)

4.1.4   Add Fixed Discounts and Terms Discounts to Purchase Orders

1. The Add Purchase Order screen now accepts a Fixed Discount Amount and Terms Discount Amount.

2. When adding a purchase order, on the Purchase Items tab, items may be deleted using the new **Delete** button, which is circled in the following figure.

4.1.5   New Fields on Clear Purchase Order Screen

The Clear Purchase Order screen has two new features:

1. The Discount link displays fixed and/or terms discount amounts.

2. The View Scanned PR&C (Purchase Request & Commitment) button that displays the scanned purchase request associated with the PO.
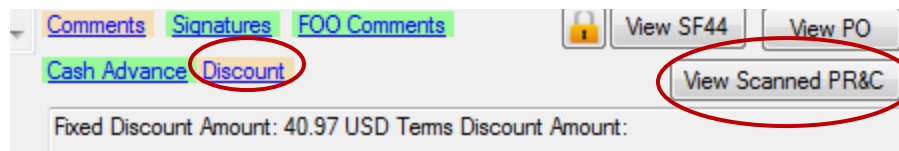
3. A new option to view orders associated with FOOs in all units; select All in the Select Unit field.
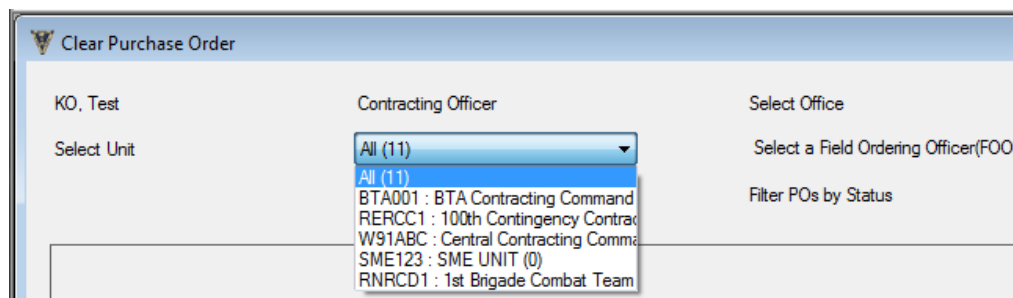
4.1.6   Purchase Order Status on Financial Administration Screen

Purchase Order status is now displayed on the Financial Administration screen. The orders associated with a selected purchase request and cash advance are displayed in the Purchases section.

4.1.7   Add Groups to the Clearance Workflow

Individual users who have the same role in an office can be grouped together for the purpose of clearing purchase orders sequentially. For example, you can create 2 groups within an office such as review and approve so that orders can go to the users assigned to the review group prior to the approve group.

Groups are created using the AOR Administration feature, by adding a group to an office.

These groups can be selected when defining the clearance workflow for purchase orders.
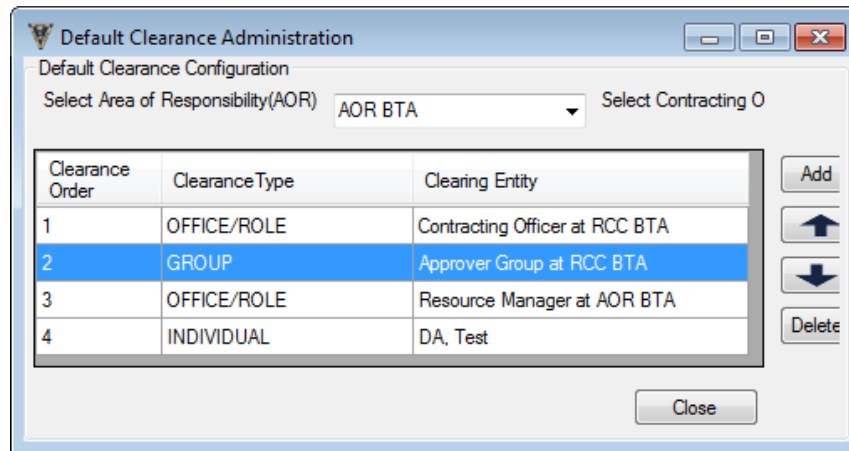
4.1.8   Creating a Generic AOR Office Type

In the AOR Administration feature, it is possible to define a "Generic" office when one of the standard office types is not appropriate. This Generic office can be assigned a role in the clearance process.

4.1.9   Web-Based User Registration

It is now possible to register as a new 3in1 Workstation user on the JCCS web site.

1. Navigate to **https://www.jccs.gov/olvr**

2. Select **CAC/Digital Certificate Users.**

3. Select your DOD certificate and enter your CAC PIN.

4. From the *Select Module* drop-down list, select **3in1**.

5. Click the **New User** link.

6. Fill in the registration screens that prompt you for personal information, security questions, and initial assignment. These screens are identical to those used when registration is launched by clicking the "Register" button on the Workstation Logon dialog box.
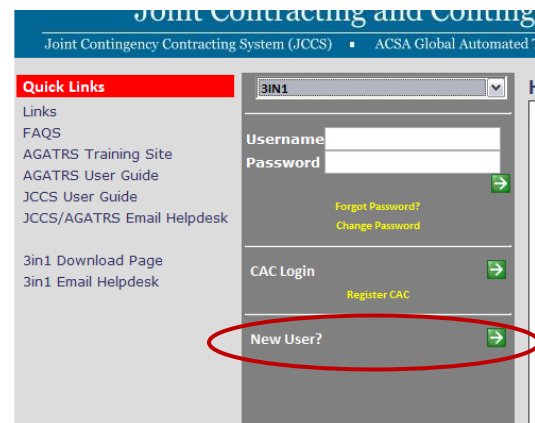
4.1.10 Download SF44s Changes

The Download SF44s feature has been modified. It enables a FOO or PA to download the SF44s they have executed or scanned into the 3in1 system, as a backup for their use. Contracting Officers, Finance Officers, and Resource Managers can also download a FOO/PAs SF44 as a batch. SF44 documents are selected based on a specific Purchase Request or based a specified date range.

To access the Download SF44 feature:

1. Select **Download SF44s** from the Reports/Extracts menu.
2. Select the Office and Unit first, if your role is anything other than FOO or PA.
    –   FOOs and PAs can only select their own documents, so they cannot select a different office, unit or user.
3. Select a user name from the drop-down menu.
4. SF44 documents can be selected based on a specific Purchase Request or by a specified date range.

    –   To view all SF44s created within a certain timeperiod, select **By Date**. Then use the Start Date and End Date fields to specify the date range for selecting a purchase request.
    –   To view SF44s associated with a specific PR, select **By Purchase Request**.
5. Click the **Load User's Documents** button.
    –   Orders associated with the FOO are listed showing the order number, associated PR number, date created, and indication if the clearance workflow has been completed.
6. Mark the check box beside the documents to download.
    –   To select all the SF44 documents that are listed, mark the **Select All SF44s** check box. To select all receipts that are listed, select the Select All Receipts check box.
7. Click the **Save Documents** button. The *Browse for Folder* dialog box is displayed.
8. Choose location to save file. Then click OK.
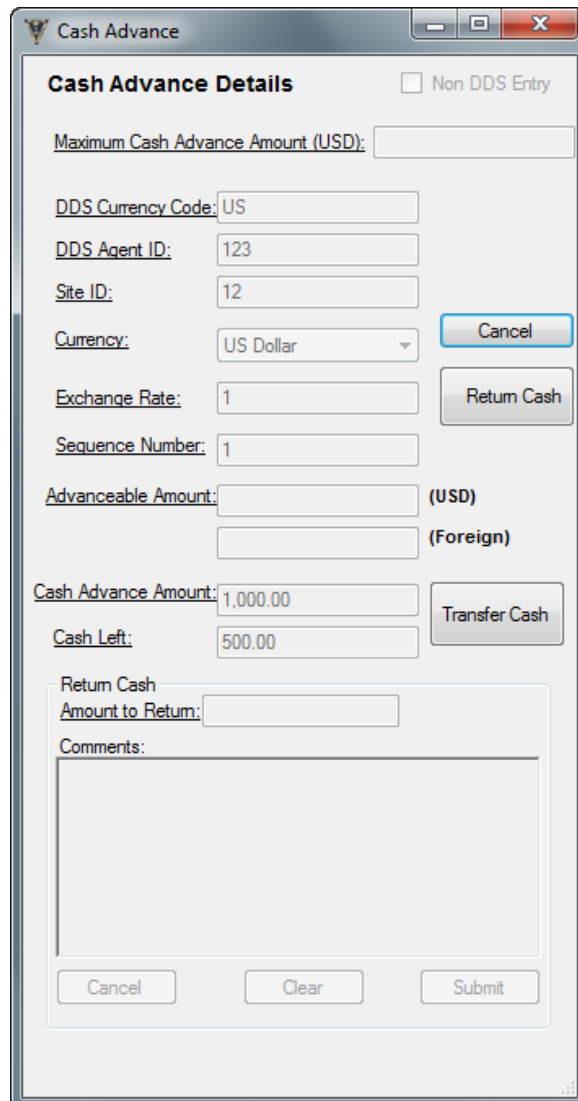
4.1.11 Cash Advance Updates

- Non-DDS cash advances can be made by marking the **Non-DDS Entry** check box on the *Cash Advance* window. This eliminates the need to enter DDS unique data (i.e., DDS Currency Code, PA ID, Site ID).

- On the *Cash Advance* window, enter the Maximum Cash Advance Amount (USD) allowed for a PA at one time. This field is for informational purposes only; it does not prevent a PA from obtaining more funding later. Once an amount has been entered in this field, it cannot be edited.

4.1.12 Miscellaneous

1. **Issue Mass PIIN Blocks**: Contracting Officers who use the **Device Management**, **Issue Mass PIIN Blocks** command can now view the numbers of available and already issued device and manual PIINs.

2. **Clearance Workflow**: Email notification is automatically sent to the next reviewer based on the email provided in the user's profile.

3. The **SF44 form** can be displayed onscreen in several places in the Workstation. The SF44 now displays in a PDF format; it previously displayed as a Word document.

4. **User Profiles** – Under **Area of Responsibility**, **Entity Profile Management**, on the **User** tab, the "Redeployment Date" field has replaced the "Deployment Date" field.

New/Updated Workstation Feature	Documented in Role-Based 3in1 Training Manual			
	FOO/PA	**Contracting Officer**	**RM/DA**	**Reviewer**
New Reports/ EDA Upload	Module 8: Reporting from the Workstation, Lesson 1: Generating Reports	Module 13: Reporting from the Workstation, Lesson 1: Generating Reports	Module 10: Reporting from the Workstation, Lesson 1: Generating Reports	Module 6: Reporting from the Workstation, Lesson 1: Generating Reports
Provisioning Completion Progress Bar	N/A	Module 6: Activating Devices for FOO/PA Teams, Lesson 1: Provisioning Devices from the Workstation	N/A	N/A
Add Purchase Order	Module 7: Managing Purchase Orders on the Workstation, Lesson 1: Manually Adding Purchase Orders	Module 9: Managing Purchase Orders on the Workstation, Lesson 1: Manually Adding Purchase Orders	N/A	N/A
Clear Purchase Order	N/A	Module 10: Clearing Purchase Orders, Lesson 1: Clearing Orders from the Workstation	Module 7: Clearing Purchase Orders, Lesson 1: Clearing Orders from the Workstation	Module 5: Clearing Purchase Orders, Lesson 1: Clearing Orders from the Workstation
Financial Administration	N/A	Module 12: Updating Financial and Procurement Information, Lesson 1: Updating Purchase Requests from the Workstation	Module 9: Updating Financial and Procurement Information, Lesson 1: Updating Purchase Requests from the Workstation	N/A

New/Updated Workstation Feature	Documented in Role-Based 3in1 Training Manual			
	FOO/PA	**Contracting Officer**	**RM/DA**	**Reviewer**
Adding Groups to the Clearance Workflow	N/A	Module 5: Configuring the 3in1 Tool Workstation, Lesson 1: AOR Setup	N/A	N/A
Creating a Generic AOR Office Type	N/A	Module 5: Configuring the 3in1 Tool Workstation, Lesson 1: AOR Setup	N/A	N/A
Web-Based Registration	Module 2: Hardware/Application Setup, Lesson 2: Registering New Users	Module 4: Managing 3in1 Workstation Users, Lesson 1: Registering New Users	Module 2: Application Setup, Lesson 2: Registering New Users	Module 2: Application Setup, Lesson 2: Registering New Users
Download SF44	Module 8: Reporting from the Workstation, Lesson 2: Downloading Orders/Vouchers	Module 13: Reporting from the Workstation, Lesson 2: Downloading Orders/Vouchers	Module 10: Reporting from the Workstation, Lesson 2: Downloading Orders/Vouchers	N/A

4.2   3in1 Handheld Device Enhancements

4.2.1   FOO and PA Dashboards

The Paying Agent role has been expanded on the 3in1 device application. The FOO and PA roles have different responsibilities and consequently have slightly different Dashboard screens now, although they share many features. The 3in1 handheld device application detects the user's role upon login and displays a Dashboard that has appropriate function buttons for a Paying Agent (PA) or Field Ordering Office (FOO). The logged in user's role (PA or FOO) displays in the titlebar on the device.

Some device features are enabled for only the FOO or PA. The main differences are the PA cannot start an order and a FOO cannot input a cash advance on the device. Shopping lists and vendor lists are shared.

- The Order tab is available to FOOs, but not to PAs
- The Rerun Order button is available to FOOs, but not to PAs
- A PA uses a Pay Order button, while a FOO uses a Start Order button

Paying Agent Dashboard   **Field Ordering Officer Dashboard**

4.2.2 New Cash Advance Functions

New functions on the Funding tab enable the Paying Agent to manage cash disbursements on the handheld device. Typically, cash advances are made on the Workstation and received on the device with provisioning data. However in some cases a PA may be given USD and will need to exchange it for local currency prior to making a payment. In these special circumstances when authorized by the disbursing agent, the PA can use the device to add a cash advance, return funds to the finance office, exchange cash into a different currency, and/or record the receipt of another cash advance.

When network connectivity is available, all cash advances changes made on the device will be uploaded to the Workstation.

Purchase Request Details Screen
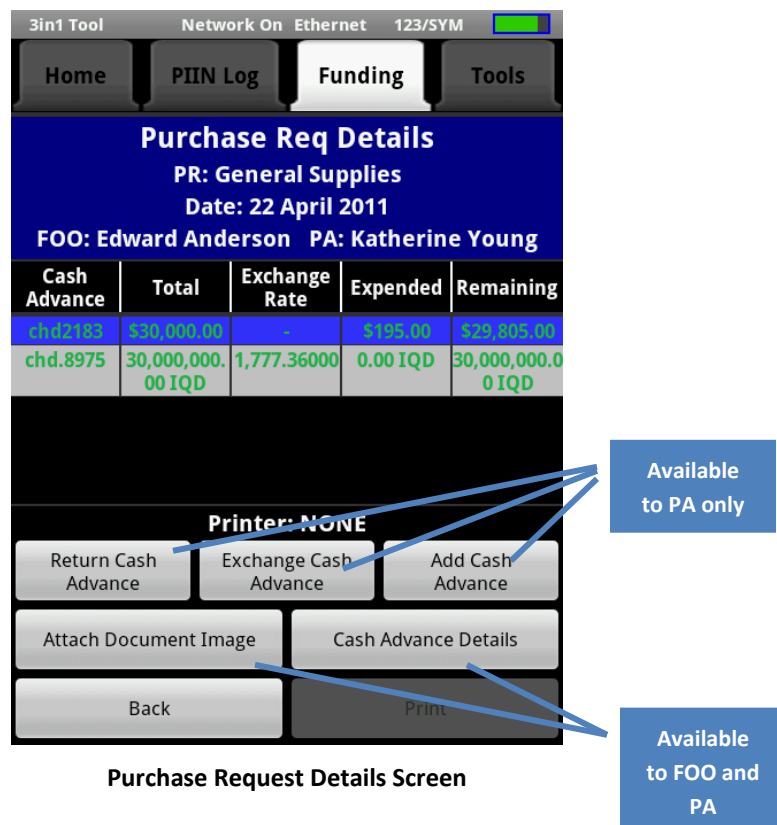
Return Cash Advance – Enables returning a cash advance; the onscreen cash advance total is re-calculated to display the difference after the return.

Exchange Cash Advance – Enables exchanging a portion or total cash advance amount to a different currency.

Add Cash Advance – Enables adding a cash advance amount to a purchase request.

Attach Document Image – Use the device built-in camera to photograph an image, such as a receipt, and attach it to the purchase request.

Cash Advance Details – Displays shows the disbursement number/description, currency and currency code, and the total amount and a breakout of expended vs. remaining amounts.

4.2.3   Add Fixed Discounts to Orders

Fixed discount amounts can now be added to an order. In some situations, a fixed discount amount is applicable. For example, merchants often do not take change so this gives the user the option to add a fixed discount to an order.

To access the Add Other Costs screen, click **Add Other Costs** on the Order screen. Then click **Fixed Discount**. On the Add Fixed Discount screen, enter the discount amount and then click **Save**.

The discount amount displays in the Fixed Discount field on the Add Other Costs screen. Note that when the order is printed, the fixed discount amount displays in the Differences box.

Add Other Costs Screen   **Add Fixed Discount Screen**

4.2.4   Enhancements for Capturing Images

Multiple images can now be taken for an order and uploaded to the Workstation. First, select an order from the PIIN Log screen. Then on the Purchase Details screen, select the Images/Receipts button. This displays an image gallery screen where new images can be taken, viewed, and deleted.

Purchase Details Screen – Click Images/Receipts

Image Gallery – Click Take Picture
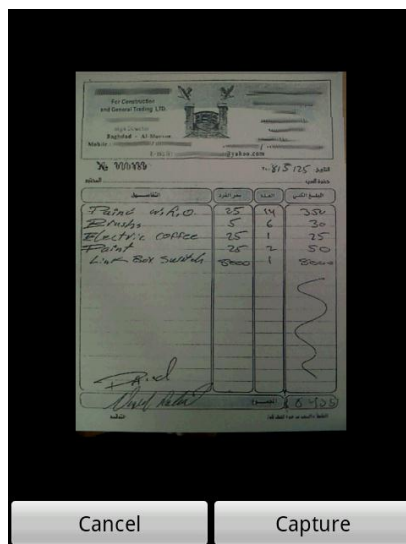
Click Capture to take the picture

Specify whether the image is a receipt or other type of image. Click Accept.

4.2.5   Device and Database Status Updates

The endpoint URL is now displayed on the Device and Database Status screen. This shows the user the URL of the connection. Also, the Device and Database Status screen no longer displays the device IP address. To access the Device and Database Status screen on the device, click the **Tools** tab, then click **Device** and **Database Status**.

4.2.6   New General Settings

The new General Settings screen can be accessed from the Out of the Box and Login screens. The General Settings screen contains options for calibrating the device, accessing the Device and Database Status screen, toggling the on-screen keyboard, viewing possible error messages, and testing the printer.
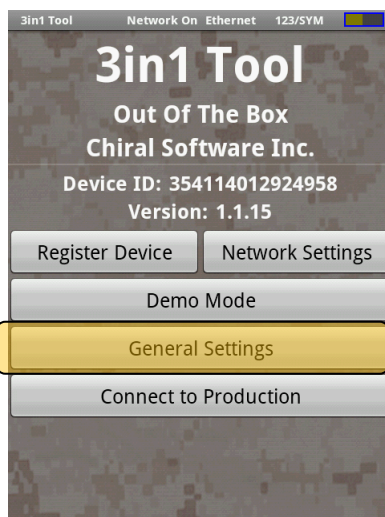
| Out of the Box Screen – Click General Settings | FOO Login Screen – Click General Settings | General Settings Screen |
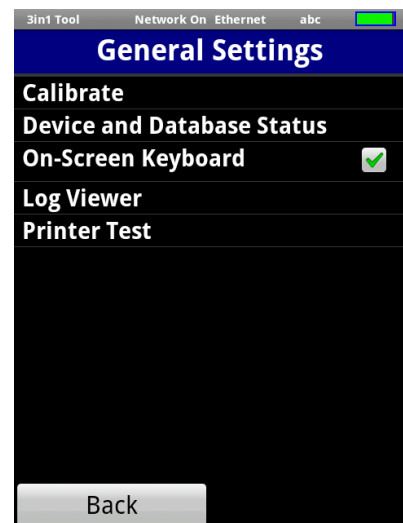
4.2.7   Expended and Remaining Amounts Display on Funding Screen

The Funding screen displays expended and remaining amounts for each Purchase Request and cash advance.

4.2.8   Updated Login Screen

The device application detects the user's role upon log in and displays "FOO Login" or "PA Login". Also, the arrangement of buttons on the Login screen has changed, as shown below.

4.2.9   Updated Provisioning Screens

Some screen changes have been made that affect the process of downloading user data the first time that a FOO or PA uses a device:

1. Click the **Get FOO List** button on the *Out of the Box* screen.

2. The *Get FOO List* screen displays provisioning data as it is received from the Workstation. Click OK when the download is finished.

3. The *Login* screen displays next, with your assigned role (PA or FOO). Select your name from the **Name** drop-down list.

4. Click the **Provision** button.

5. Enter your login password in the *Enter Password* pop-up screen.

6. The *Loading Provisioning Data* screen shows the password is verified. Click OK to continue to the device Dashboard.
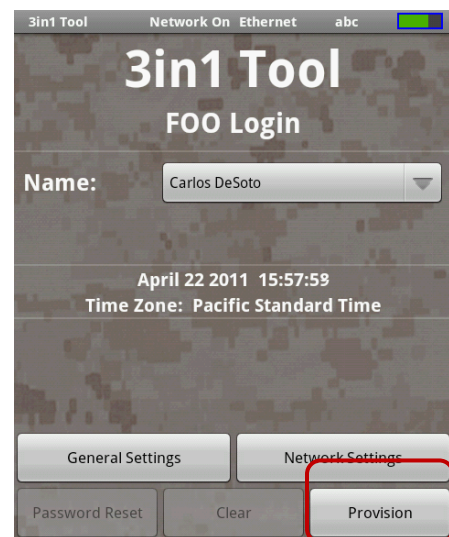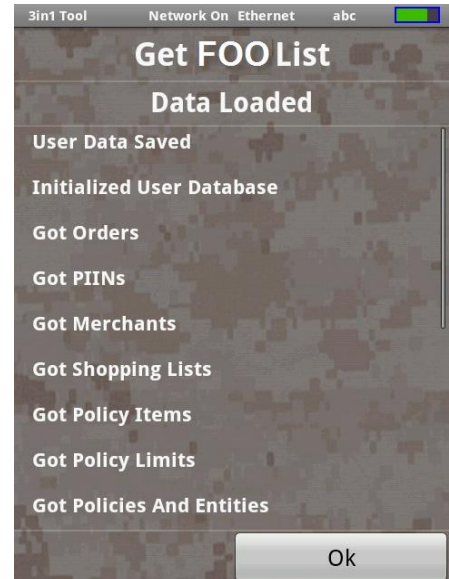
4.2.10 Currency Converter Enhancements

The Currency Converter screen now obtains currencies and exchange rates from disbursements that contain foreign currencies. The user selects the Currency Converter from the menu list, then the disbursement to use for the converter. Then the user enters the amount to convert and the device calculates and displays the converted amount.

3in1 Tool	Network On Ethernet	123/SYM

Tools

Calculator
Conversion Calculator
Currency Converter
Generic Currency Converter
View PIIN Blocks
View Procurement Controls
Market Research
Printer Test
Settings
Calibrate
Device and Database Status
Log Viewer
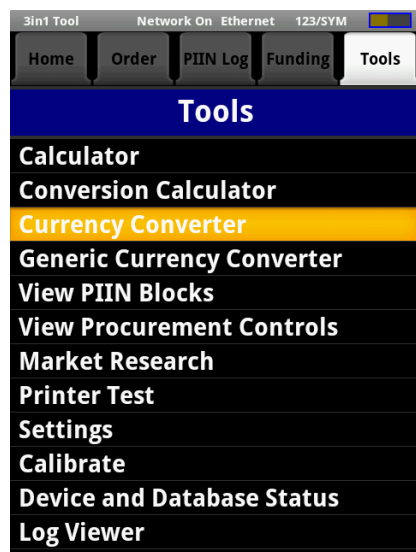
Select the Currency Converter

3in1 Tool	Network On Ethernet	123/SYM

Select Cash Advance

Cash Advance	Expended	Remaining
CHD657	0.00 GEL	2,500.00 GEL

Back   Next

Select a disbursement

3in1 Tool	Network On Ethernet	123/SYM

Currency Converter
Currency: Lari
Current Rate: $1.00 = 1.45346 GEL
From USD

Enter Amount in USD   100.00

Convert to
Lari
Converted Amount: 145.35

To USD

Enter Amount   250.00

Convert from
Lari
Converted Amount: $172.00

Finished   Clear   Convert

Enter values and click "Convert"

4.2.11 Available PIINs on Dashboard

The Dashboard screen is now refreshed properly after changing the date on the device. The PIINs Available count is now consistently accurate.

4.2.12 Paying Agent Updates

4.2.12.1 Insufficient Cash Notification

The Paying Agent can no longer pay for orders when there is insufficient cash left in the disbursement. On the Paying Agent signature screen, the Confirm button is unavailable and the remaining cash displays in red, as a negative amount.

4.2.13 Options for Confirming Payment

The Paying Agent has two options for confirming payment: The PA can confirm his/her identity while the FOO is still logged in and make payment, or the FOO logs out and the PA logs in and makes payment.

To confirm the PA's identity while the FOO is still logged in:

- The PA enters the login password on the Paying Agent Screen, or

- The PA clicks **Forgot Password** and must correctly answer security questions

PA Password Screen   **PA Security Questions**

4.2.14 Final Receiver Signature Screen Update

If the final receiver has already signed a purchase order, after re-provisioning, the View Delivery To screen will display the following message:

New/Updated Device Feature	Documented in Role-Based 3in1 Training Manual			
	FOO/PA	**Contracting Officer**	**RM/DA**	**Reviewer**
FOO and PA Dashboards	Module 5: The Ordering Process, Lesson 2: Making a Purchase	Module 7: The Ordering Process, Lesson 1: Making a Purchase	N/A	N/A
Cash Advance Functions	Module 8: Managing Cash Advances on the Device, Lesson 1: Working with Cash Advances	Module 12: Updating Financial and Procurement Information, Lesson 3: Managing Cash Advances on the Device	Module 4: Issuing Purchase Requests and Cash Advances, Lesson 2: Issuing Cash Advances from the Workstation	N/A
Adding Fixed Discounts	Module 5: The Ordering Process, Lesson 2: Making a Purchase	Module 7: The Ordering Process, Lesson 1: Making a Purchase	N/A	N/A
Taking Pictures	Module 5: The Ordering Process, Lesson 2: Making a Purchase	Module 7: The Ordering Process, Lesson 2: Uploading Orders to the 3in1 Workstation	N/A	N/A

New/Updated Device Feature	Documented in Role-Based 3in1 Training Manual			
	FOO/PA	Contracting Officer	RM/DA	Reviewer
Device and Database Status Screen	Module 11: 3in1 Device Tools & Settings, Lesson 1: Device Tools	Module 15: 3in1 Device Tool Settings, Lesson 1: Device Tools	N/A	N/A
General Settings	Module 4: Activating Devices for FOO/PA Teams, Lesson 1: Downloading FOO Data for the First Time	Module 2: Hardware/Application Setup, Lesson 3: Registering & Approving New Devices	N/A	N/A
Funding Screen	Module 3: Application Familiarization, Lesson 3: Navigating the 3in1 Device Application	Module 7: The Ordering Process, Lesson 1: Making a Purchase	N/A	N/A
Updated Login Screen	Module 3: Application Familiarization, Lesson 3: Navigating the 3in1 Device Application	Module 7: The Ordering Process, Lesson 1: Making a Purchase	N/A	N/A

New/Updated Device Feature	Documented in Role-Based 3in1 Training Manual			
	FOO/PA	Contracting Officer	RM/DA	Reviewer
Updated Provisioning Screens	Module 4: Activating Devices for FOO/PA Teams, Lesson 1: Downloading FOO Data for the First Time	Module 6: Activating Devices for FOO/PA Teams, Lesson 2: Downloading Data to the 3in1 Device for the First Time	N/A	N/A
Currency Converter	Module 10: 3in1 Device Tools & Settings, Lesson 1: Device Tools	Module 15: 3in1 Device Tools & Settings, Lesson 1: Device Tools	N/A	N/A
Paying Agent Updates	Module 5: The Ordering Process, Lesson 2: Making a Purchase	Module 7: The Ordering Process, Lesson 1: Making a Purchase	N/A	N/A